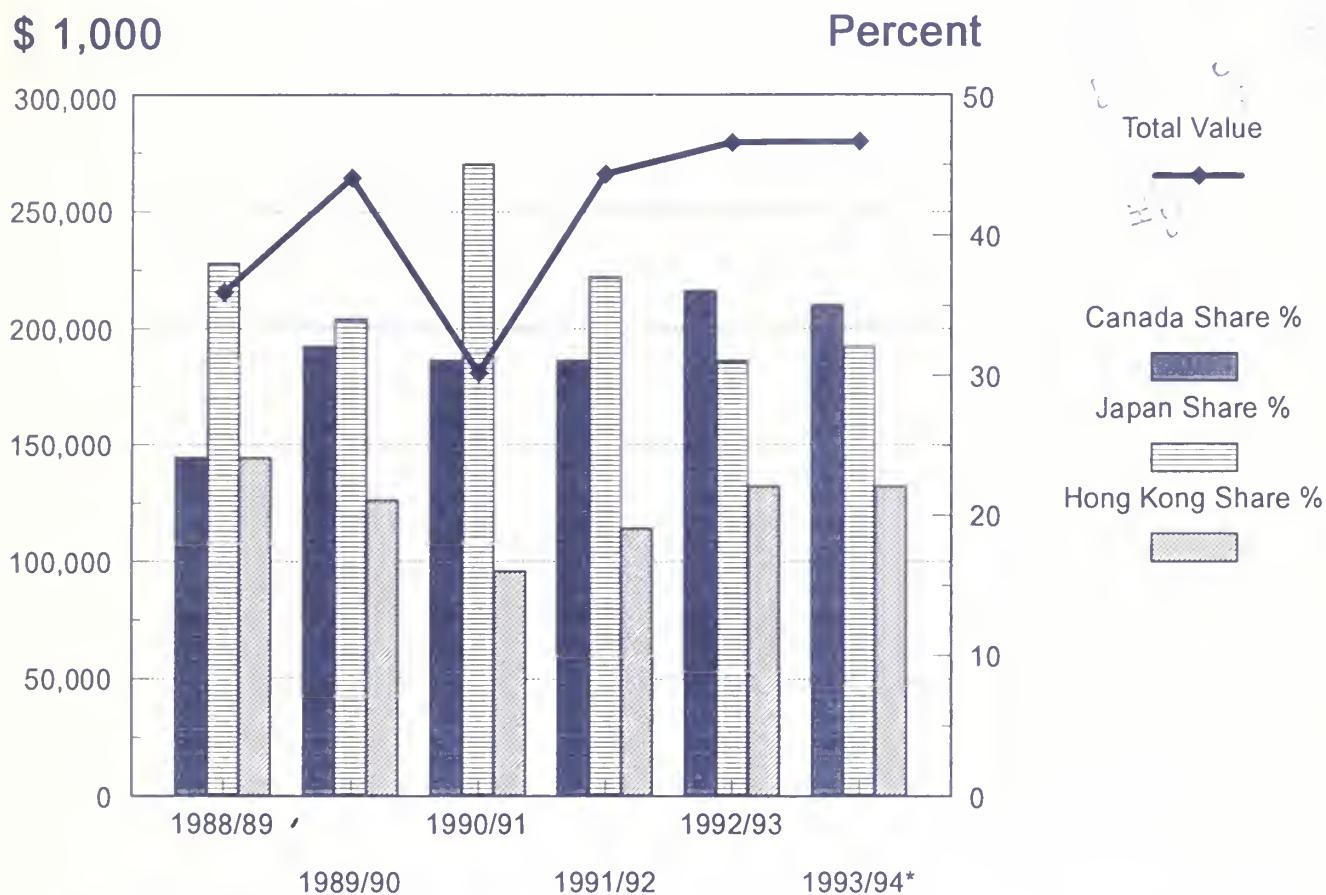


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World Horticultural Trade & U.S. Export Opportunities

Record 1992/93 Value of U.S. Orange Exports Forecast to Hold in 1993/94



Source: U.S. Bureau of the Census
Marketing Year- November to October

U.S. orange exports in marketing year 1992/93 reached a record 556,348 metric tons, valued at \$280 million, also a record. Major U.S. customers are Canada, Japan, and Hong Kong, accounting for over 80 percent of total shipments. Although production of U.S. oranges is forecast down in 1993/94, the good quality of the crop, some improvement of the Japanese economy, and a lower European fruit production, will maintain good U.S. orange export prospects in 1993/94.

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Foreign Agricultural Service
Horticultural and Tropical Products Division
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Washington, DC 20250-1049

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Howard R. Wetzel, Deputy Director for Analysis
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ANALYSIS

Kelly Kirby Flowers	202-720-4620	Fresh deciduous fruit, apple juice, olives, and Asia-specific issues
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Craig Jenkins	202-720-6086	Canada-specific issues, berries, and PL-480
Ross Kreamer	202-720-9903	Canned deciduous fruit, kiwifruit, beer, hops, NAFTA, and GSM-102 export credits
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, tropical fruit, avocados, nursery products, cut flowers, and South American-specific issues
Katherine Nishiura	202-720-0911	Wine, table grapes, brandy, tree nuts, and EC-specific issues
Samuel Rosa	202-720-9792	Fresh citrus, fruit juices, honey, and CBI-specific issues
Joe Somers	202-720-2974	Situation and outlook group leader, fresh and processed citrus, and FAO citrus liaison
Mark Thompson	202-720-6877	Circular editor, fresh and processed potatoes, dried fruit, trade forecasts, and cross-commodity issues

MARKETING

Laura Davis	202-720-2252	Apples, strawberries, blueberries, and fresh tomatoes
Ted Goldammer	202-720-8498	Wine, brandy, and almonds
Jean Harman	202-720-0897	Fresh and canned pears, canned peaches, fresh cherries, honey, hops, and potatoes
Stacey Peckins	202-690-1341	Nursery products, avocados, pistachios, papaya, and canned tomatoes
Elise Pinkow	202-690-1341	Table grapes, concord grapes, peaches, pears, plums, and cranberries
Steve Shnitzler	202-720-8495	Walnuts, kiwifruit, ginseng, asparagus, tart cherries, and processed corn
Robert B. Tisch	202-720-0898	Citrus, raisins, and prunes

For subscription questions or address changes, please contact Robertha McLean, 202-720-9445.

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Export Summary

U.S. exports of horticultural products in October 1993 totaled \$753 million, a 1.3 percent increase over October 1992. Export performance by product category was mixed in October 1993. Tree nuts saw a healthy 7 percent jump in exports to \$182 million. Citrus as a grouping saw a decline of 7.7 percent to \$41 million, but lemon exports increased by 61 percent (\$6 million) in that month to \$16½ million, while grapefruit exports dropped 41 percent to \$13 million. Deciduous fruit exports were up 1.3 percent to \$88 million, mostly because of a 13 percent jump in grape exports, to \$42 million. Fresh vegetable exports dropped 6 percent to \$69 million. Processed vegetable exports were down 5 percent to \$103 million. Juice exports were up 5 percent to \$38 million. Wine exports were up 13 percent to \$18 million. Other products, including potato chips, beer, and prepared foodstuffs were also up 17 percent to \$93 million.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,
 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) =
 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
OCT 93

NAME		QUANTITY								VALUE (1,000 DOLLARS)									
GROUP	COMMODITY	CURR	MO	CURR	MO	YR	TODATE	YR	TODATE	LAST	CURR	MO	CURR	MO	YR	TDT	YR	TDT	LAST
		LAST	YR	CURR	YR	LAST	YR	CURR	YR	YEAR	LAST	YR	CURR	YR	LAST	YR	CURR	YR	
FR, FRUIT CITRUS MT	GRAPEFRUIT	38,657	22,225	38,657	22,225	444,767	22,812	13,405	22,812	13,405	22,812	13,405	22,812	13,405	22,812	13,405	22,812	13,405	222,290
LEMONS	14,497	13,985	14,497	13,985	127,336	10,273	16,511	10,273	16,511	10,273	16,511	10,273	16,511	10,273	16,511	10,273	16,511	10,273	99,568
ORANGES, INCL TMPLS	22,395	16,146	22,395	16,146	562,596	10,581	10,656	10,581	10,656	10,581	10,656	10,581	10,656	10,581	10,656	10,581	10,656	10,581	279,503
OTHER CITRUS	915	693	915	693	19,313	1,154	632	1,154	632	1,154	632	1,154	632	1,154	632	1,154	632	1,154	632
Subtotal:----	76,466	53,050	76,466	53,050	1,154,014	44,621	41,206	44,621	41,206	44,621	41,206	44,621	41,206	44,621	41,206	44,621	41,206	44,621	41,206
FR, FRT, NON-CIT MT	APPLÉS	57,595	52,430	57,595	52,430	487,808	36,720	33,638	36,720	33,638	36,720	33,638	36,720	33,638	36,720	33,638	36,720	33,638	297,141
AVOCADOS	168	582	168	582	14,185	3,325	573	3,325	573	3,325	573	3,325	573	3,325	573	3,325	573	3,325	14,223
CHERRIES SWT & TRT	72	10	72	10	25,747	2,234	2,234	2,234	2,234	2,234	2,234	2,234	2,234	2,234	2,234	2,234	2,234	2,234	111,252
GRAPES	36,134	41,197	36,134	41,197	184,774	37,214	42,098	37,214	42,098	37,214	42,098	37,214	42,098	37,214	42,098	37,214	42,098	37,214	215,189
KIWIFRUIT	248	230	248	230	8,359	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	12,071
MELONS	9,629	9,756	9,629	9,756	196,473	4,568	4,539	4,568	4,539	4,568	4,539	4,568	4,539	4,568	4,539	4,568	4,539	4,568	4,539
PAPYRA	654	608	654	608	7,598	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143	1,143
PEACHES & NCTRNS	1,851	1,075	1,851	1,075	63,998	8,363	9,328	8,363	9,328	8,363	9,328	8,363	9,328	8,363	9,328	8,363	9,328	8,363	14,151
PEARS	13,866	16,579	13,866	16,579	16,526	8,277	8,277	8,277	8,277	8,277	8,277	8,277	8,277	8,277	8,277	8,277	8,277	8,277	7,192
PLUMS/PRUNES	3,852	2,445	3,852	2,445	59,859	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218	8,218
STRAWBERRIES	3,923	3,125	3,923	3,125	49,415	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262	8,262
OTHER NON-CITRUS	8,572	8,769	8,572	8,769	53,450	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528	7,528
Subtotal:----	132,737	136,811	132,737	136,811	1,243,586	107,284	110,180	107,284	110,180	107,284	110,180	107,284	110,180	107,284	110,180	107,284	110,180	107,284	1,039,381
CND/PREP FRUIT MT	CHERRIES TRT CND	798	530	798	530	7,322	1,245	945	1,245	945	1,245	945	1,245	945	1,245	945	1,245	945	12,632
FRUIT MIXTURES	3,395	2,784	3,395	2,784	35,007	3,255	3,255	3,255	3,255	3,255	3,255	3,255	3,255	3,255	3,255	3,255	3,255	3,255	39,597
MARACHINO CHRY	5,569	450	5,569	450	4,912	1,057	822	1,057	822	1,057	822	1,057	822	1,057	822	1,057	822	1,057	9,706
PEACHES CANNED	1,917	1,977	1,917	1,977	21,390	1,879	1,938	1,879	1,938	1,879	1,938	1,879	1,938	1,879	1,938	1,879	1,938	1,879	20,960
PINEAPPLE CANNED	422	777	422	777	4,295	376	696	376	696	376	696	376	696	376	696	376	696	376	3,931
FRT PREP/PRES	6,462	5,620	6,462	5,620	61,466	7,898	6,700	7,898	6,700	7,898	6,700	7,898	6,700	7,898	6,700	7,898	6,700	7,898	75,437
OTHER CANNED FR	3,562	2,480	3,562	2,480	32,246	3,346	2,441	3,346	2,441	3,346	2,441	3,346	2,441	3,346	2,441	3,346	2,441	3,346	30,629
Subtotal:----	17,129	14,621	17,129	14,621	166,641	19,421	16,800	19,421	16,800	19,421	16,800	19,421	16,800	19,421	16,800	19,421	16,800	19,421	192,895
DRIED FRUIT MT	DRIED PRUNES	11,615	7,241	11,615	7,241	84,752	17,890	16,054	17,890	16,054	17,890	16,054	17,890	16,054	17,890	16,054	17,890	16,054	137,529
RAISINS, DRIED	15,026	12,660	15,026	12,660	121,529	20,815	19,840	20,815	19,840	20,815	19,840	20,815	19,840	20,815	19,840	20,815	19,840	20,815	180,885
OTHER DRIED FRUIT	2,604	2,465	2,604	2,465	19,865	6,694	6,678	19,865	6,678	19,865	6,678	19,865	6,678	19,865	6,678	19,865	6,678	19,865	49,237
Subtotal:----	29,246	22,368	29,246	22,368	228,148	45,656	42,773	45,656	42,773	45,656	42,773	45,656	42,773	45,656	42,773	45,656	42,773	45,656	367,651
FROZEN FRUIT MT	BLUEBERRIES, FZN	881	424	881	424	8,600	1,473	646	1,473	646	1,473	646	1,473	646	1,473	646	1,473	646	15,058
STRAWBERRIES, FZN	1,185	1,498	1,185	1,498	1,185	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	22,864
OTHER ZZN FRUIT	1,560	1,261	1,560	1,261	1,251	2,626	2,626	2,626	2,626	2,626	2,626	2,626	2,626	2,626	2,626	2,626	2,626	2,626	22,26
Subtotal:----	3,727	3,184	3,727	3,184	3,184	40,849	5,834	4,595	40,849	5,834	4,595	40,849	5,834	4,595	40,849	5,834	4,595	4,595	59,849
FRT&VEG JUICE (SSE) KL	GRAPEFRUIT JU CNC	3,491	2,808	3,491	2,808	60,686	2,327	1,734	2,327	1,734	2,327	1,734	2,327	1,734	2,327	1,734	2,327	1,734	36,980
ORANGE JU NT CNC	8,191	7,908	8,191	7,908	7,908	92,328	6,463	5,562	8,191	7,908	6,463	5,562	8,191	7,908	6,463	5,562	8,191	7,908	68,746
ORANGE JUICE CNC	22,380	20,749	22,380	20,749	20,749	349,883	9,034	8,585	9,034	8,585	9,034	8,585	9,034	8,585	9,034	8,585	9,034	8,585	140,737
OTHER JUICES	35,991	39,439	35,991	39,439	39,439	363,216	18,145	21,889	18,145	21,889	18,145	21,889	18,145	21,889	18,145	21,889	21,889	214,146	
Subtotal:----	70,056	70,906	70,056	70,906	70,906	866,115	35,971	37,772	35,971	37,772	35,971	37,772	35,971	37,772	35,971	37,772	35,971	460,611	
VEGETABLES FR MT	ASPARAGUS, FR, CHLD	164	161	164	161	21,288	401	372	401	372	401	372	401	372	401	372	401	372	62,514
BROCCOLI	5,974	7,497	5,974	7,497	7,497	102,948	4,645	4,964	4,645	4,964	4,645	4,964	4,645	4,964	4,645	4,964	4,645	49,649	
CAULIFLOWER	5,477	6,183	5,477	6,183	6,183	70,346	3,540	4,182	3,540	4,182	3,540	4,182	3,540	4,182	3,540	4,182	3,540	49,628	
CELERI	6,771	7,151	6,771	7,151	7,151	115,257	2,415	2,711	2,415	2,711	2,415	2,711	2,415	2,711	2,415	2,711	2,415	51,058	
LETTUCE, FR, CH.	30,656	28,822	30,656	28,822	28,822	315,002	13,544	12,387	13,544	12,387	13,544	12,387	13,544	12,387	13,544	12,387	13,544	154,873	
ONIONS, FR	18,110	15,581	18,110	15,581	15,581	183,005	6,236	5,047	6,236	5,047	6,236	5,047	6,236	5,047	6,236	5,047	6,236	71,840	
PEPPERS	5,074	4,495	5,074	4,495	4,495	60,961	3,373	3,793	3,373	3,793	3,373	3,793	3,373	3,793	3,373	3,793	3,373	48,485	
TOMATOES, FR, CH.	13,016	13,326	13,016	13,326	13,326	167,332	12,180	7,915	12,180	7,915	12,180	7,915	12,180	7,915	12,180	7,915	12,180	133,834	
OTHER VEG, FR.	36,726	39,064	36,726	39,064	36,726	63,995	27,047	27,461	27,047	27,461	27,047	27,461	27,047	27,461	27,047	27,461	27,047	35,598	
Subtotal:----	121,970	122,285	121,970	122,285	122,285	1,675,138	73,384	68,835	73,384	68,835	73,384	68,835	73,384	68,835	73,384	68,835	73,384	997,304	
VEGETABLES CANNED MT	CUT SWEET C. CHILI SA	2,174	2,202	2,174	2,202	23,641	1,730	1,955	1,730	1,955	1,730	1,955	1,730	1,955	1,730	1,955	1,730	1,955	18,526
SWEET CORN CANNED	17,801	14,035	17,801	14,035	14,035	175,881	12,778	10,881	12,778	10,881	12,778	10,881	12,778	10,881	12,778	10,881	12,778	10,881	
TOMATO PASTE	7,807	8,138	7,80																

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
OCT 93

NAME		QUANTITY								VALUE (1,000 DOLLARS)								
GROUP	COMMODITY	CURR	MO	CURR	MO	YR	TODATE	YR	TODATE	CURR	MO	CURR	MO	YR	TDT	YR	TDT	LAST
FRESH FRUIT	MT																	
APPLES		9,236	6,244	9,236	6,244	119,770	2,324	1,884	2,324	1,884	7,392	5,382	5,382	1,884	7,392	12,899	70,726	
AVOCADO		7,348	1,333	7,348	1,333	186,470	7,332	6,244	8,281	8,281	63,891	5,243	5,243	1,044,787	7,392	12,899	70,726	
BANANA		297,184	291,84	297,184	291,84	3,539	5,585	8,281	8,281	79,243	63,891	63,891	79,243	1,044,787	63,891	63,891	79,243	
CANTALOUE		3,684	1,090	3,684	1,090	1,090	1,090	1,090	1,090	3,627	1,422	3,627	1,422	1,542	317	63,655	63,655	
GRAPE		1,156	119	1,156	119	325	334	401	325	87	401	87	401	87	211,626	87	211,626	
KIWIFRUIT		196	118	196	118	318	247	739	318	298	739	298	739	298	16,302	16,302	16,302	
MANGO		127	603	127	603	110,290	121	1,143	110,290	121	1,143	121	1,143	121	84,344	84,344	84,344	
PEACH		40	0	40	0	0	41	376	0	0	41	376	0	0	26,410	0	26,410	
PEAR		893	738	893	738	64,825	2,456	1,270	64,825	2,456	1,270	2,456	1,270	32,038	1,270	32,038	1,270	
PINEAPPLE		8,764	8,707	8,764	8,707	124,177	3,627	3,113	8,707	124,177	3,627	3,113	8,707	3,113	46,139	46,139	46,139	
STRAWBERRY		39	127	39	127	127	14	470	127	176	14	470	176	176	22,158	176	22,158	
OTHER MELON		2,768	2,886	2,768	2,886	114,510	819	965	114,510	819	965	819	965	965	41,350	965	41,350	
OTHER FRUIT		44,075	39,301	44,075	39,301	512,714	19,564	17,861	512,714	19,564	17,861	19,564	17,861	17,861	205,691	17,861	205,691	
Subtotal:----		376,375	353,346	376,375	353,346	5,220,125	121,049	107,272	5,220,125	121,049	107,272	121,049	107,272	107,272	1,892,412	107,272	1,892,412	
DRYED FRUIT	MT																	
DRD APRICOT		1,365	768	1,365	768	11,053	3,353	1,981	3,353	1,981	1,981	1,981	1,981	1,981	25,135	1,981	25,135	
DRD FIG & PASTE		626	876	626	876	8,786	2,631	1,422	8,786	2,631	1,422	1,422	1,422	1,422	10,808	1,422	10,808	
OTHER DRD FRUIT		1,816	2,563	1,816	2,563	29,643	2,232	1,049	29,643	2,232	1,049	2,232	2,232	2,232	36,546	2,232	36,546	
Subtotal:----		3,809	4,208	3,809	4,208	49,483	7,217	7,452	49,483	7,217	7,452	7,452	7,452	7,452	72,490	7,452	72,490	
FROZEN FRUIT	MT																	
FZN BLUEBERRIES		421	614	421	614	5,677	891	894	5,677	891	894	891	894	894	9,926	894	9,926	
FZN STR		354	336	354	336	19,937	420	485	19,937	420	485	420	485	485	21,271	420	21,271	
OTHER FZN FRUIT		1,523	4,246	1,523	4,246	32,037	2,035	3,655	32,037	2,035	3,655	2,035	3,655	3,655	34,039	2,035	34,039	
Subtotal:----		2,298	5,198	2,298	5,198	57,651	3,347	5,035	57,651	3,347	5,035	3,347	5,035	5,035	65,236	3,347	65,236	
CANNED/PREP FRUIT	MT																	
CANNED OLIVES		9,136	8,240	9,136	8,240	74,492	18,287	16,106	74,492	18,287	16,106	18,287	16,106	16,106	153,316	16,106	153,316	
CANNED ORANGES		2,716	2,611	2,716	2,611	41,806	3,009	2,249	41,806	3,009	2,249	3,009	2,249	2,249	39,502	3,009	39,502	
CANNED PEACH		4,272	2,904	4,272	2,904	23,011	2,973	1,622	23,011	2,973	1,622	2,973	1,622	1,622	2,973	1,622	2,973	
CANNED PINEAPPLE		20,244	25,004	20,244	25,004	344,866	12,999	13,486	344,866	12,999	13,486	12,999	13,486	13,486	212,896	12,999	212,896	
MIXED FRUIT		1,408	1,926	1,408	1,926	3,405	1,423	1,704	3,405	1,423	1,704	1,423	1,704	1,704	29,875	1,704	29,875	
PREP/PRES FRUIT		4,982	4,902	4,982	4,902	58,233	5,620	5,675	58,233	5,620	5,675	5,620	5,675	5,675	66,860	5,620	66,860	
OTHER CANNED FRUIT		3,690	4,527	3,690	4,527	47,278	4,840	5,962	47,278	4,840	5,962	4,840	5,962	5,962	60,772	4,840	60,772	
Subtotal:----		46,450	50,117	46,450	50,117	623,093	49,154	46,807	623,093	49,154	46,807	49,154	46,807	46,807	578,600	49,154	578,600	
FRT&VEG JUICE (SSE)	KL																	
APPLE/PELAR JU		64,330	90,163	64,330	90,163	946,807	21,221	18,597	946,807	21,221	18,597	21,221	18,597	18,597	243,682	18,597	243,682	
FCP JU		137,118	176,613	137,118	176,613	1,122,350	26,601	35,203	1,122,350	26,601	35,203	26,601	35,203	35,203	191,591	35,203	191,591	
GRAPE JU		12,245	13,388	12,245	13,388	20,404	4,893	4,643	20,404	4,893	4,643	4,643	4,643	4,643	52,117	4,643	52,117	
PINAP JU		16,501	22,282	16,501	22,282	339,270	5,797	5,093	339,270	5,797	5,093	4,993	5,093	5,093	52,117	5,093	52,117	
OTHER FRUIT JU		8,313	16,605	8,313	16,605	149,584	9,781	9,198	149,584	9,781	9,198	9,198	9,198	9,198	77,630	9,198	77,630	
Subtotal:----		238,410	306,003	238,410	306,003	2,705,217	61,296	68,161	2,705,217	61,296	68,161	61,296	68,161	68,161	642,789	68,161	642,789	
FRESH VEGETABLES	MT																	
GARLIC		347	3,759	347	3,759	29,171	2,084	2,084	29,171	2,084	2,084	2,084	2,084	2,084	23,144	2,084	23,144	
ASPARAGUS		1,573	2,273	1,573	2,273	29,852	1,974	2,732	29,852	1,974	2,732	1,974	2,732	2,732	39,213	1,974	39,213	
BELL PEPPER		2,860	4,480	2,860	4,480	121,859	4,643	4,643	121,859	4,643	4,643	4,643	4,643	4,643	129,247	4,643	129,247	
CARROTS		8,036	8,711	8,036	8,711	51,431	1,750	1,968	51,431	1,750	1,968	1,750	1,968	1,968	14,066	1,750	14,066	
CHILI PEPPER		2,339	1,575	2,339	1,575	36,933	1,422	1,211	36,933	1,422	1,211	1,422	1,211	1,211	48,709	1,422	48,709	
CUCUMBER		4,497	2,814	4,497	2,814	238,841	1,917	1,917	238,841	1,917	1,917	1,917	1,917	1,917	85,192	1,917	85,192	
ONIONS		7,000	9,404	7,000	9,404	218,190	7,069	5,585	218,190	7,069	5,585	7,069	5,585	5,585	104,818	7,069	104,818	
POTATO, INCL SD		14,957	21,538	14,957	21,538	302,186	2,331	4,389	302,186	2,331	4,389	2,331	4,389	4,389	49,596	2,331	49,596	
SQUASH		2,653	2,087	2,653	2,087	95,290	1,607	1,702	95,290	1,607	1,702	1,607	1,702	1,702	87,590	1,702	87,590	
TOMATOS		7,838	19,754	7,838	19,754	380,911	4,487	12,760	380,911	4,487	12,760	4,487	12,760	12,760	307,454	4,487	307,454	
OTHER FRESH VEGETAB		16,159	15,770	16,159	15,770	285,285	8,369	7,812	285,285	8,369	7,812	8,369	7,812	7,812	156,317	8,369	156,317	
Subtotal:----		68,264	92,171	68,264	92,171	1,790,165	35,845	47,551	1,790,165	35,845	47,551	35,845	47,551	47,551	1,045,351	47,551	1,045,351	
CANNED/DEHYD VEGET	MT																	
CND ARTICHOKE		1,332	980	1,332	980	20,456	2,233	1,563	20,456	2,233	1,563	2,233	1,563	1,563	32,256	2,233	32,256	
CANNED BAMBOO		2,963	4,025	2,963	4,025	26,680	2,322	2,951	26,680	2,322	2,951	2,322	2,951	2,951	24,939	2,322	24,939	
CND MSHROOMS		5,063	3,329	5,063	3,329	4,329	4,213	11,057	4,329	4,213	11,057	4,213	4,213	4,213	100,977	4,213	100,977	
CND PTIMENTO		483	572	483	572	4,572	4,172	912	4,572	4,172	912	912	912	912	8,532	912	8,532	
CND TOM		6,213	4,314	6,213	4,314	4,314	4,500	2,182	4,314	4,500	2,182	2,182	2,182	2,182	17,799	2,182	17,799	
CANNED WATERCHESTNU		3,432	2,796	3,432	2,796	39,558	2,371	2,066	39,558	2,371	2,066	2,371	2,066	2,066	22,926	2,371	22,926	
TOMATO PASTE & SAUC		2,243	1,231	2,243	1,231	40,209	1,296	1,296	40,209	1,296	1,296	1,296	1,296	1,296	88,838	1,296	88,838	
DRIED MUSHROOMS		90	95	90	95	1,817	1,633	1,326	1,817	1,633	1,326	1,633	1,326	1,326	22,462	1,633	22,462	
DRD TOMATOES		812	917	812	917	6,491	3,439	3,439	6,491	3,439	3,439	3,439	3,439	3,439	25,842	3,439	25,842	
OTHER DEHYD																		

Export News and Opportunities

GSM-102 registrations begin to hop. Activity during the past month in the GSM-102 credit guarantee program for horticultural products focused entirely on sales of hops to Mexico. U.S. exporters have registered \$600,000 of hops, the first GSM-102 program

sales of the current fiscal year. The table below shows that thus far in FY 1994, a total of \$15.0 million has been allocated for horticultural products and commodities under the GSM-102 program.

FY 1994 GSM-102 Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 (\$1,000)	Exporter Applications Approved (\$1,000)	Balance
Colombia			
Fresh fruits 2/	500	0	500
Tree nuts	500	0	500
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	1,000	0	1,000
Hops	2,000	600	1,400
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Turkey			
Potatoes 3/	5,000	0	5,000
Venezuela			
Fresh Fruits 4/	2,000	0	2,000

1/ Coverage through 12/21/93.

2/ Apples, pears, plums, peaches, nectarines, and strawberries.

3/ Cut for french fries.

4/ Apples, pears, plums, grapes, cherries, and peaches.

Prospects are blossoming for fruitful horticultural trade under NAFTA.

The North American Free Trade Agreement's (NAFTA) recent passage will help sustain the growth of U.S. horticultural exports to Mexico and Canada recorded during the past several years. Collectively, these markets account for about 37 percent of total U.S. horticultural export value, estimated at \$7.3 billion in fiscal year 1993. U.S. shipments to Mexico last year soared to \$343 million despite phytosanitary and other technical problems on certain fruits and vegetables. Mexico is now the fifth largest U.S. horticultural export market, with good prospects for further gains in coming years due, in part, to sweeping liberalization under NAFTA. The agreement also opens up the U.S. market to greater competition from Mexico. In fiscal year 1993 the United States imported \$1.78 billion of horticultural products from Mexico, including \$804 million of fresh vegetables. As a means of mitigating potentially adverse effects under NAFTA, the U.S. Congress stipulated a number

of safeguard measures to monitor trade flows with our NAFTA partners (see FHORT 12-93, page 9).

With the implementation of NAFTA's Schedule "A" tariff cuts on January 1, 1994, numerous U.S. horticultural items will be able to enter Mexico duty-free. The following four tables present selected Schedule "A" items. After each entry appears its associated export value for fiscal year 1993. Duties on these items in 1993 ranged from 10 to 20 percent. Numerous items on Schedules "B" and "C" will face lower duties on January 1, 1994. These include: 1) canned sweet corn (HSC 20058000; "C" at 15 percent); and 2) and fresh pears/quinces (HSC 08082020/40; "B" at 15 percent).

Next month the circular will feature a comparison of trade values of selected Schedule "A" commodities for trade between the United States and Mexico.

Mexico's NAFTA Tariff Concessions Selected Schedule "A" Items for Tariff Elimination on January 1, 1994 *Fresh & Processed Fruit*

Commodity	HS Code	Note	Value(\$M)1/
Grapes	(08061000)	(Oct. 15 - May 31)	\$ 2.177
Prunes,dried	(08132020)	not in brine	\$ 1.857
Strawberries	(08101000)	fresh	\$ 1.643
Strawberries	(08122000)	pres., not for immed. cons	\$ 0.444
Cantaloupes	(08071000)	(Jan. 1 - May 15)	\$ 0.548
Raisins	(08062000)		\$ 0.469
Lemons	(08053020)		\$ 0.251
Grapefruit	(08054000)	(Aug. 1 - Sep. 30)	\$ 0.000
Cherries	(08092020/40)		\$ 0.094
Dates	(08041000)		\$ 0.156
Oranges	(08051040)	(Jun. 1 - Nov. 30)	\$ 0.042
Mandarins	(08052000)		\$ 0.003
Guava/Mango	(08045040)		\$ 0.091
Pineapple	(08043020)	fresh or dried	\$ 0.190
Figs	(08042040/60)	fresh or dried	\$ 0.000
Other citrus	(08059000)	f/d,e.g.,kumquat,citron	\$ 0.011
Papaya	(08072000)	fresh	\$ 0.067
Raspberries	(08102010)	also loganberries	\$ 0.011

Mexico's NAFTA Tariff Concessions
Selected Schedule "A" Items for Tariff Elimination on January 1, 1994
Nursery Products & Cut Flowers

Commodity	HS Code	Note	Value(\$M)1/
Hyacinth bulbs	(06012010)	without soil	\$ 0.067
Tree/Shrub/bush	(06022000)		\$ 1.378
Rose plants	(06024000)		\$ 1.029
Perennials	(06029930)	herbaceous	\$ 0.327
Live plants	(06029960)	other, with soil	\$ 0.315
Cut flowers	(06031000)	various types	\$ 4.305
Foliage/branch	(06049100)	parts of plants	\$ 1.157
Foliage/branch	(06049900)	others	\$ 3.828

Mexico's NAFTA Tariff Concessions
Selected Schedule "A" Items for Tariff Elimination on January 1, 1994
Tree Nuts

Commodity	HS Code	Note	Value(\$M)1/
Almond	(08021100)	fresh/dried, in shell	\$ 0.628
Almond	(08021200)	fresh/dried, shelled	\$ 5.156
Walnut	(08023100)	fresh/dried, in shell	\$ 1.379
Walnut	(08023200)	fresh/dried, shelled	\$ 0.339
Pistachio	(08025020)	fresh/dried, in shell	\$ 1.616
Pistachio	(08025040)	fresh/dried, shelled	\$ 0.519
Pecans	(08029010)	fresh/dried, in shell	\$10.394

Source: "NAFTA Side-by-Side Tariff Schedule," FAS/ITP, 1992; NAFTA Annex 302.2 Schedule of the U.S., USG Printing Office, 1993.

1/ Values are FOB, reported by U.S. Census for FY 1993 for exports to Mexico.

Mexico's NAFTA Tariff Concessions
Selected Schedule "A" Items for Tariff Elimination on January 1, 1994
Fresh & Processed Vegetables

Commodity	HS Code	Note	Value(\$M)1/
Onion/shallot	(07031030)	not over 16 mm.	\$ 6.759
Garlic	(07032000)		\$ 1.838
Leeks	(07039000)		\$ 0.050
Head Lettuce	(07051100)	(Jun. 1 - Oct. 31)	\$ 5.695
Lettuce,other	(07051920)	(Jun. 1 - Oct. 31)	\$ 1.562
Chicory	(070521/29)	Whitloof and others	\$ 0.004
Peppers,chili	(07096000)	Bell	\$ 1.890
Celery, Fr/Ch	(07094040)	(Apr. 15 - Jul. 31)	\$ 0.921
Beans, Pr/Ps	(2005590000)	not shelled/frozen	\$ 0.816
Peas, Fr/Ch	(07081000)	<u>P. sativum</u>	\$ 0.027
Peas, Frz	(07102100)	<u>P. sativum</u>	\$ 0.754
Veges, Frz	(07108040)	Others,e.g.,bamboo shoots	\$ 0.527
Mixed Veg,Frz	(07109000)	Other mixtures	\$ 0.265
Pumpkins	(07099050)	Fresh	\$ 0.419
Lima beans	(07082010)	<u>Vigna</u> or <u>Phaeseolus</u> fr/ch	\$ 0.183
Lima beans	(07102210)	<u>Vigna</u> or <u>Phaeseolus</u> frz	\$ 0.163
Cauliflower	(07041020/40)	broc.(Jun. 5 - Oct. 15 & Dec)	\$ 0.319
Brussels Spts	(07042000)		\$ 0.005
Carrots	(07061000)		\$ 0.296
Cabbage	(07049020)	fresh/chilled	\$ 0.142
Chickpeas	(07089005	fr/ch, garbanzos & other	\$ 0.049
Radishes	(07069000)	fresh/chilled	\$ 0.095
Cucumbers	(07070000)	(Dec. 1 - Feb. & Jul. 1 - Aug. 31)	\$ 0.057
Kohlrabi/Kale	(07049040)	(Jun. 1 - Oct. 31)	\$ 0.030
Artichokes	(07091000)	globe	\$ 0.017
Asparagus	(07092010)	(Sep. 15 - Nov. 15 by air)	\$ 0.028
Asparagus	(07092090)	(Jan. 1 - Dec. 31, White)	\$ 0.000
Eggplant	(07093000)		\$ 0.008
Olives	(07112015)	green, not pitted, intermed	\$ 0.000
Capers	(07113000)	provisionally preserved	\$ 0.000
Spinach	(07103000)	Raw or cooked and frozen	\$ 0.000
Truffles	(07095200)		\$ 0.000

Source: "NAFTA Side-by-Side Tariff Schedule," FAS/ITP, 1992; NAFTA Annex 302.2 Schedule of the U.S., USG Printing Office, 1993.

1/ Values are FOB, reported by U.S. Census for FY 1993 for exports to Mexico.

World Trade Situation and Policy Updates

Bilateral talks between officials of China Animal and Plant Quarantine (CAPQ) and APHIS have led to a phytosanitary agreement for importing Washington State apples into China.

The agreement, which was signed on December 18, includes a requirement that the fruit be cold-treated prior to export. An earlier proposed requirement by China that the fruit be fumigated was dropped. The duration of the cold treatment requirement will be 40 days at 0 degrees Celsius or 90 days at 3.3 degrees Celsius, the same treatment that is required for U.S. exports to Mexico. Trade should begin in early 1994, after the United States provides China with a list of qualified growers and packers and China sends inspectors to Washington state to verify the list.

Although trade sources estimate that approximately 12,000 metric tons of U.S. apples are sold annually in China's markets, the phytosanitary import ban has limited imports of U.S. apples to shipments arriving unofficially via Hong Kong. APHIS will continue to work with CAPQ on gaining access for a number of other fresh fruits with good market potential, including stone fruit, grapes, and citrus fruit.

China announces reduced tariffs for apples.

In addition to the agreement to allow the imports of U.S. apples, China has recently announced that the tariff on imported apples will be reduced from 80 percent to 40 percent effective January 1, 1994. The tariff reduction should allow imported apples to be more affordable to a larger number of consumers, and more competitive with China's domestically produced apples.

Colombia has reopened its market to U.S. apples and pears.

After closing its market on September 30, 1993, due to the reported detection of the codling moth pest in a shipment of apples from the United States, Colombia agreed to lift the import ban on apples and pears, effective December 15. This development was made possible following an agreement between the two countries' plant

health agencies on a new quarantine work plan. Under the plan, the United States has agreed to intensify the rate of inspection for the codling moth pest for apple and pear shipments destined for Colombia. Another key provision of the work plan provides for an annual inspection trip by a Colombian plant quarantine official to U.S. apple and pear growing areas, with the costs associated with these visits to be covered by the trade. U.S. exports of apples and pears to Colombia in marketing year 1992/93 totaled \$3 million and \$330,000, respectively.

The EU has eliminated the export refund for grape juice concentrate headed for Sweden; transshipments to the United States have ceased.

In the wake of complaints by the U.S. grape juice industry, the European Union (EU) recently eliminated export refunds for grape juice concentrate (GJC) exports destined for Sweden. By all indications, Swedish traders were re-exporting most of the subsidized exports from Spain to the United States, making Sweden the largest foreign "supplier" of GJC to the U.S. market in 1993, according to Census Bureau data. U.S. GJC imports from Sweden in January-October totaled about \$16 million, or 51 million liters, single strength equivalent. Total imports for the same period were \$37.0 million, or 109 million liters. (U.S. GJC imports from Sweden have dropped to nearly zero in the most recent two months of available data, September and October 1993, indicating that the ploy has stopped.) The EU also cut by 20 percent the export refunds for GJC and certain types of wines targeted for other destinations. However, even with the subsidy reduction, the Agricultural Counselor in Madrid reports that an attractive incentive may still exist for moving GJC to the United States through an alternative third country.

Editor's Note: As you may have noticed, we have a new name: World Horticultural Trade & U.S. Export Opportunities. This title more accurately reflects the contents, as well as the FAS mission. Let us know what other changes you would like to see.

World Fresh Citrus Situation

U.S. marketing opportunities for fresh citrus in 1994 are expected to show some improvement over 1993, despite continuing recession in Europe and Japan. U.S. exports will be bolstered by a sizeable crop of good quality fruit. There will also be less competition from deciduous fruit in Europe, where production is expected to be down from the previous season's large output.

Northern Hemisphere

Total citrus production in selected major producing countries in the Northern Hemisphere in 1993/94 is forecast at 40.8 million metric tons (differs from total published in December in World Agricultural Production because tangerine production in South Korea is not included in this report), 4 percent below last season's record output. This projected decline is largely due to lower orange production in the United States, Mexico, and Spain. Total orange production in selected countries in 1993/94 is forecast at 23.1 million tons, down 5 percent from 1992/93. Grapefruit production is expected to decline 6 percent in 1993/94, to 3.3 million tons, because a smaller crop is forecast in the United States. A projected 23 percent reduction in Spain's lemon output will likely reduce production in the Northern Hemisphere by 4 percent in 1993/94, to 2.87 million tons. Total tangerine production, on the other hand, is projected up 2 percent for 1993/94, to 10.1 million tons. Production of other citrus, mostly limes, is forecast up 3 percent, to 1.46 million tons.

Total fresh citrus exports in 1993/94 are forecast at 6.0 million tons, essentially unchanged from the previous season. Slight decreases in orange and lime shipments are expected to be offset by increases in grapefruit, tangerine, and lemon shipments.

Citrus for processing in 1993/94 is forecast at 12.75 million tons, or 6 percent below the 1992/93 level. The United States accounts for nearly all of the expected decrease in processing. A decrease in the Florida orange crop is the major reason for the expected drop in processing in the United States.

Spain

Citrus production for 1993/94 is forecast at 4.6 million tons, down 13 percent from the record 1992/93 harvest, but only slightly below the 5-year average of 4.7 million tons. The 20-percent drop in orange production forecast for 1993/94 can be attributed to inclement weather during pollination and reduced orchard care because of low grower prices for last year's record crop. Lemon production for 1993/94 is forecast at 570,000 tons, down 23 percent because of insufficient rainfall in Murcia, one of Spain's major lemon production regions. Tangerine production is forecast up 4 percent, to 1.59 million tons, mainly due to higher yields for Clementines as young trees reach mature bearing levels.

Spain is the world's largest exporter of fresh citrus, marketing more than half of its total citrus production. Citrus exports in 1993/94 are forecast at 2.5 million tons, unchanged from last season's volume. The bulk of Spain's exports are expected to go to traditional markets such as

Germany, France, the United Kingdom, Holland, and Belgium. The European Union (EU), known previously as the European Community (EC), continues to provide Spain with export refunds for fresh orange and lemon shipments to non-EU countries outside North America. In 1992/93, 15 percent of Spain's orange exports and 21 percent of its lemons exports went to non-EU markets outside North America.

In 1993, Spanish lemon exports to Japan were authorized. Lemons exported to Japan must be treated for the Mediterranean Fruit Fly using cold treatment. The Spanish ban on imports of fresh citrus from third countries was lifted on June 1, 1993, which allow U.S. grapefruit to be imported into the Spanish market for the first time.

United States

Total citrus production in the United States for the 1993/94 season is forecast at 13.1 million tons, 6 percent below the 1992/93 harvest. Lower production is expected for all citrus but tangerines. The 1993/94 U.S. orange crop is forecast at 9.4 million tons, 6 percent below last season's output. Florida's orange production is forecast at 7.1 million tons, down 8 percent from 1992/93. Groves, trees, and fruit remain in good condition, although rainfall has been below normal in most citrus areas. Normally, Florida accounts for about 75 percent of total U.S. orange production and it is mostly for processing. The California 1993/94 orange crop is forecast to decrease slightly to 2.2 million tons. California orange production is used primarily for fresh consumption and exports. Total U.S. grapefruit production in 1993/94 is forecast at 2.3 million tons, 8 percent below the 1992/93 output. Lemon production is forecast at 837,000 tons, practically unchanged from the 1992/93 crop.

U.S. citrus exports are forecast at 1.2 million tons in 1993/94, slightly above last season's volume. Exports of oranges in 1993/94 are forecast at last season's record level of 550,000 tons. Although production of U.S. oranges is forecast down, the crop is still a large one, and export sizes for navels are plentiful. Fresh

grapefruit shipments are expected to rebound from last season to 470,000 tons, an increase of almost 7 percent. The later maturing grapefruit crop in Florida should extend the export season beyond last year.

U.S. citrus for processing in 1993/94 is forecast at 9.0 million tons, down 9 percent from 1992/94. A smaller Florida orange crop is the reason for the expected reduction in processing.

Mexico

Mexican citrus production is estimated to be 3.5 million tons in 1993/94, 5 percent below the revised 1992/93 record citrus crop. The expected lower output, which is forecast for all types of citrus except grapefruit, is mainly the result of an "off-year" in Mexico's alternate citrus production cycle, combined with reduced use of inputs. In addition, unfavorable weather, caused by hurricane Gert in September 1993, affected citrus in Veracruz, the main citrus producing state. The 1993/94 orange crop, which accounts for nearly 75 percent of Mexico's total citrus production, is forecast to decrease 5 percent from the revised 1992/93 record of 2.7 million tons. Lime production in 1993/94 is estimated to be slightly lower than the 1992/93 crop. Grapefruit production is forecast to increase moderately in 1993/94 due to more trees coming into production.

Mexican citrus exports are expected to decrease slightly in 1993/94 due to reduced supplies. Lime shipments are forecast to decrease 15 percent to 85,000 tons in 1993/94. The damage caused by hurricane Gert to the crop reduced lime export prospects. The United States is the leading destination for Mexican limes, accounting for about 90 percent of Mexico's total lime exports. Orange exports have significantly decreased in recent years. Exports of oranges in 1993/94 are forecast to remain unchanged from last season's shipments. The United States, Canada, France, and Germany continue to be the largest export markets for Mexican oranges. Some Mexican exporters are exploring Asian markets, such as Hong Kong and Japan.

Under the implementation of the North American Free Trade Agreement (NAFTA), Mexico's tariff on oranges imported from the United States will change to match U.S. tariffs. For the season from December 1 to May 31, duties on oranges will be 2.2 cents per kilogram, with a tariff phase-out of 5 years. For oranges from June 1 to November 30, the tariff will be eliminated immediately. Given the limited number of oranges available for export during the June 1-November 30 period, little increase in Mexican orange exports to the United States is expected with the immediate removal of this tariff. The eventual elimination of the relatively small "in-season" tariff of 2.2 cents per kilogram should also not significantly affect Mexican orange exports to the United States. Mexican tariffs on imported limes will be eliminated immediately. The United States will phase-out its 2.2 cents per kilogram import tariff on limes over a 10 year period.

Mexican citrus for processing in 1993/94 is forecast to increase due to improved international prices for frozen concentrated orange juice. However, the amount of oranges delivered to processors will also depend on fresh orange prices in the domestic market. In Mexico, growers tend to sell to the fresh market first, with the residual going to the processing plants.

Morocco

Moroccan citrus production in 1993/94 is forecast at 1.35 million tons, 10 percent higher than last season's output. Production is expected to increase for all major types of citrus because of good tree recovery following an "off-year" in Morocco's alternate bearing citrus cycle. However, fruit size is expected to be smaller due to inadequate water supplies. Orange production is forecast at 990,000 tons, up 13 percent compared to last year's level. The tangerine crop in 1993/94 is forecast at 325,000 tons, 3 percent above the 1992/93 output. The total area devoted to citrus is expanding about 2 percent annually. The increased area is being planted mainly to orange (Maroc-late), tangerines (Ortanique), and lemons in response to greater

export demand for these varieties. All citrus is irrigated and wells are the most prevalent source of water.

Total Moroccan citrus exports in 1993/94 are forecast at 506,000 tons, 4 percent above last season's volume. Orange exports are forecast at 355,000 tons, up 10 percent from 1992/93. Tangerine exports in 1993/94 are forecast at 150,000 tons, 6 percent below the previous season's volume. Smaller fruit size has reduced the proportion of tangerines suitable for export. The export market absorbs the best quality fruit and usually provides the highest return. Processing is considered the least desirable outlet as it provides the lowest return to producers. About 75 percent of all Moroccan citrus exports are handled through the Atlas Fruit Board (AFB), which includes exporters, packing houses, and growers. This group handles all exports to non-EU countries such as the Scandinavian countries, Saudi Arabia, Algeria, Canada, and the United States. The remaining amount of exports are handled by a few independents. The EU continues to take most Moroccan citrus exports. The EU imposes a countervailing duty on citrus when prices fall below an established reference price.

Citrus for processing is forecast to increase in 1993/94 as FRUMAT, the sole juice processor, is recovering from financial problems.

Turkey

Turkish citrus production in 1993/94 is forecast to decline 4 percent to 1.6 million tons. Unusually cold temperatures during last winter combined with dry weather conditions during the fall, reduced production prospects for all types of citrus. Orange production, which accounts for about half of total citrus output, is forecast at 800,000 tons, 3 percent below the revised 1992/93 output. Turkey's lemon production is forecast at 400,000 tons, while production of tangerines is expected to decrease 5 percent to 370,000 tons. The bulk of the citrus production is consumed domestically in the fresh market.

Turkish citrus exports in 1993/94 are forecast at 255,000 tons, up slightly from the previous season's volume. Lemons, tangerines, and oranges account respectively for 40, 35, and 16 percent of Turkey's citrus exports. For the last two years, citrus exports have been affected by lower priced citrus from the EU. Production subsidies in the EU have reduced citrus prices in East European and former Soviet Union markets, which are traditionally important destinations for Turkish citrus. Also, EU countervailing duties, applied on citrus entering EU markets from third countries, have made Turkish citrus less competitive in these markets. In addition, exports to the main markets in the Middle East have been hampered by increased transportation costs, the result of higher fees paid for trucks passing through Syria and Jordan. Turkey's major citrus customers normally are Romania, Saudi Arabia, Russia, Germany, and Austria. The marketing of citrus is handled by private dealers and exporters.

Greece

Total citrus production is forecast to decrease 5 percent in 1993/94 to 1.02 million tons. Unfavorable weather in 1993, which primarily affected the orange crop, is the reason for the reduction in citrus output. Orange production in 1993/94 is forecast at 800,000 tons, down 8 percent from the record 872,000 tons produced in 1992/93. The 1993/94 lemon crop is estimated at 135,000 tons, while tangerine production is forecast at 75,000 tons, practically unchanged from the record crop of 1992/93.

Total citrus exports in 1993/94 are forecast at 352,000 tons, 13 percent below 1992/93 shipments. Decreased orange export prospects, based on the smaller orange crop, more than offset likely increased lemon shipments. Major destinations for Greek orange exports are the Netherlands, Germany, the United Kingdom, and France. Principal customers for Greek lemons are Poland, Romania, and Bulgaria.

Italy

Although Italy's citrus crop for 1993/94 is forecast down 2 percent from last season, to 3.34 million tons, it is still an above-average harvest. While the orange and tangerine crops are forecast down 8 and 4 percent, respectively, because of lower yields, lemon output is projected up because of a 7-percent increase in yield. During the 1993/94 season, Italian citrus will have to compete with other EU-produced citrus in the Italian market because of reforms in phytosanitary regulations. This is expected to force more Italian production into processing because Spain, Italy's main competitor, produces better table quality fruit.

Citrus exports are forecast at 173,000 tons, practically unchanged from shipments of the last two seasons. Demand for Italian citrus is not strong because of its relatively poor quality. In addition, competition from Spain and other Mediterranean countries, combined with the reduction of EU export subsidies, have discouraged Italian citrus exports.

The Italian citrus industry is expected to be adversely affected by the new harmonization of EU phytosanitary rules, which allowed entry of Spanish citrus into Italy beginning in 1993. Undesirable citrus varieties and high production costs have made the Italy's citrus industry noncompetitive.

Citrus for processing, mostly oranges, is expected to increase more than 1 million tons in 1993/94. EU processing subsidies continue to encourage the processing of citrus fruit into juice.

Egypt

Egypt's 1993/94 citrus crop is forecast at 2.43 million tons, down 3 percent from a year ago, due to above-normal temperatures during the growing season. Orange production is forecast down 4 percent, to 1.70 million tons. The orange yield was down 3 percent in 1992/93 and a 5-percent reduction is projected this season due to improper grove care, high salinity

levels, disease problems, and aging trees. The Egyptian Government does not allow the establishment of new orchards or the replanting of existing groves in the Nile Delta, the major orange producing area, because the Government wants this land replanted to staple food crops. Additionally, growers lack the capital to establish groves in other locations because of the lag time, i.e., these groves will not bear fruit or provide any income for approximately 5 years. Tangerine production is forecast down 12 percent in 1993/94, to 300,000 tons, because of lower yields. However, an increase in bearing tree numbers appears likely to boost output of other types of citrus fruits (mostly limes) by 10 percent this season to 425,000 tons.

Total Egyptian citrus exports are forecast at 206,000 tons in 1993/94, down 19 percent from shipments in the previous season. Lower supplies is the major reason for expected reduced exports. Since the decline of exports to the former Soviet Union, an increasing percentage of orange shipments are directed to Arab countries, as well as to Western Europe and Far East markets. Saudi Arabia remains the major destination for Egyptian top quality navel oranges. The increased participation of the private sector in orange trade has improved Egypt's image as a citrus exporter.

China

The 1993/94 Chinese citrus crop is forecast to increase 11 percent to 5.6 million tons, as new trees planted as part of China's afforestation program begin to reach bearing age. Continued citrus production increases, averaging 8 percent annually, are forecast through the end of the century. Tangerine production in 1993/94 is estimated at 4.4 million tons. Tangerines are by far China's major citrus crop, accounting for 67 percent of total citrus output. The orange crop is forecast at 1.2 million tons, up 11 percent from the 1992/93 output. About 16 percent of Chinese citrus is oranges, with the remainder mostly pommelos and lemons. The agricultural reforms taking place in China are allowing many farmers to expand beyond traditional grain production and to switch land to the production

of fruit. Since 1990, fruit production has increased annually by 11 percent, primarily due to expansion in citrus production. Citrus production accounted for 23 percent of China's total fruit production in 1993.

China's citrus exports in 1993/94 are expected to increase slightly to 72,000 tons. Tangerines shipments, which are forecast to increase steadily as production grows, account for almost all of China's citrus exports. Main markets for Chinese tangerines are Singapore, Hong Kong, Malaysia, Canada, and Russia. China is likely to become a competitor in the Asian region, as quality and quantity of Chinese citrus improves. China's small citrus imports are comprised primarily of oranges. U.S. citrus remains banned from entry into China, due to phytosanitary concerns. Despite the restrictions, some U.S. oranges and lemons can be found in southern China, which enter via Hong Kong. Import tariffs for citrus are set at 80 percent.

Cyprus

Citrus production in 1993/94, for the entire island, is forecast at 333,000 tons, practically unchanged from the 1992/93 level. Orange and grapefruit production are expected to increase 3 and 2 percent respectively in the 1993/94 season, reflecting good growing conditions. On the other hand, the 1993/94 lemon harvest is expected to decline to 45,000 tons, due to continued uprooting, as producers are discouraged by lower export prices. Increased labor costs, more competition from countries such as Morocco and Cuba, and subsidies to citrus producers in the EU, will limit future expansion of the Cyprus citrus industry.

Total citrus exports in 1993/94 are forecast to increase 4 percent to 187,000 tons, based on the expected increase in orange and grapefruit production. The main outlets for Cyprus citrus exports are the EU and Eastern Europe. However, more competition from Mediterranean countries, EU subsidies for citrus member producers, and generally stable EU demand will continue to limit citrus exports.

Japan

Japanese citrus production in 1993/94 is forecast at nearly 2 million tons, 11 percent below the 1992/93 output. Increased competition from imported citrus, plus structural changes and an aging farm population, are responsible for the expected decrease. Tangerines account for almost all of Japan's citrus production. The 1993/94 tangerine crop is forecast at 1.8 million tons, 11 percent below production in the 1992/93 season.

Total citrus imports are estimated to increase in 1993/94 to 505,000 tons, based on some recovery of Japan's economy. Orange imports are estimated to increase 4 percent to 170,000 tons. Imports of grapefruit are also forecast to increase by about 3 percent to 245,000 tons. The United States remains the dominant supplier of fresh oranges to Japan, although U.S. export growth has been restrained in past years by the Japanese recession.

Israel

Israel's citrus output is forecast to increase to 1.1 million tons in 1993/94. Citrus production has slightly recovered from past drought years and the record cold winter of 1991/92. More production is expected for all types of citrus except grapefruit. The 1993/94 orange harvest is forecast to increase 25 percent to 500,000 tons, while grapefruit production is forecast to decline slightly to 380,000 tons.

Total citrus exports are expected to recover somewhat from the 1991/92 season's low level due to expected higher production. Citrus for processing is also forecast to increase in 1993/94. However, processing of grapefruit is estimated smaller, based on the reduced crop forecast.

Cuba

Citrus production in Cuba has declined since the 1989/90 season -- from about 1.0 million tons to the current level of 774,000 tons. The downward trend primarily reflects cutbacks in grove maintenance because of a lack of fertilizer and other inputs.

Total citrus exports have also fallen from 468,000 tons in 1989/90 to 48,000 tons in 1992/93. The loss of traditional Cuban export markets such as the former Soviet Union and Eastern European countries is the major reason for declining exports. Exports are expected to increase slightly in 1993/94 but will remain significantly below previous highs.

Revised Southern Hemisphere

Total citrus production in selected countries in the Southern Hemisphere in 1992/93 has been revised upward slightly to 18.2 million tons. Upward revisions in the Argentine orange and Brazilian tangerine crops are the principal reasons for the higher citrus output.

Total citrus exports were revised down by 13 percent to 888,000 tons, mostly due to lower than expected shipments from Argentina. Argentine exports were reduced due to lower demand in Europe, Argentina's main customer, caused by the economic recession.

It is still too early to make reliable forecasts for the Southern Hemisphere countries in 1993/94.

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FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)

Table 1: TOTAL CITRUS

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	350	0	214	98	38
1992/93	329	0	180	101	48
1993/94 F	333	0	187	101	46
Egypt					
1991/92	2,420	0	112	16	2,293
1992/93	2,502	0	254	16	2,232
1993/94 F	2,433	0	206	18	2,209
Gaza					
1991/92	104	0	95	0	9
1992/93	104	0	95	0	9
1993/94 F	104	0	95	0	9
Greece					
1991/92	1,024	6	312	195	523
1992/93	1,080	0	406	193	481
1993/94 F	1,022	0	352	182	488
Israel					
1991/92	1,042	49	332	579	180
1992/93	900	33	258	602	173
1993/94 F	1,065	45	331	589	190
Italy					
1991/92	3,023	48	179	1,082	1,810
1992/93	3,406	48	179	927	2,344
1993/94 F	3,339	68	173	1,089	2,130
Morocco					
1991/92	1,090	0	508	45	537
1992/93	1,225	0	486	93	646
1993/94 F	1,350	0	506	120	724
Spain					
1991/92	4,584	0	2,478	647	1,459
1992/93	5,288	3	2,466	837	2,188
1993/94 F	4,598	0	2,462	486	1,650
Turkey					
1991/92	1,895	7	440	172	1,090
1992/93	1,674	12	248	171	1,269
1993/94 F	1,812	10	255	164	1,203
Subtotal Mediterranean Basin					
1991/92	15,332	110	4,870	2,833	7,939
1992/93	16,508	94	4,570	2,840	9,390
1993/94 F	15,856	123	4,567	2,749	8,648
Other Northern Hemisphere					
Cuba					
1991/92	758	0	102	178	480
1992/93	774	0	48	218	508
1993/94 F	774	0	73	200	501
Japan					
1991/92	2,087	521	13	325	2,250
1992/93	2,219	492	12	401	2,298
1993/94 F	1,985	505	13	287	2,210
China					
1991/92	4,386	0	47	139	4,200
1992/93	6,080	0	65	188	4,839
1993/94 F	5,810	0	72	185	5,353
Mexico					
1991/92	3,094	3	93	338	2,666
1992/93	3,738	3	113	338	3,292
1993/94 F	3,545	3	99	372	3,077
United States					
1991/92	11,297	138	1,111	7,508	2,816
1992/93	13,848	133	1,146	9,829	3,006
1993/94 F	13,064	137	1,184	8,981	3,036
Subtotal Other Northern Hemisphere					
1991/92	21,602	660	1,388	8,484	12,412
1992/93	25,639	628	1,384	10,940	13,943
1993/94 F	24,978	645	1,441	10,006	14,177
Total Northern Hemisphere					
1991/92	36,934	770	6,038	11,317	20,351
1992/93	42,147	722	6,954	13,580	23,333
1993/94 F	40,834	768	6,008	12,754	22,825
Southern Hemisphere					
Argentina					
1991/92	1,650	3	217	644	892
1992/93	1,570	2	163	695	714
1993/94 F	NA	NA	NA	NA	NA
Australia					
1991/92	704	8	92	385	236
1992/93	864	8	85	368	221
1993/94 F	NA	NA	NA	NA	NA
Brazil					
1991/92	18,352	0	99	11,908	4,345
1992/93	14,683	0	99	10,358	4,208
1993/94 F	NA	NA	NA	NA	NA
Chile					
1991/92	187	0	6	0	181
1992/93	187	0	6	0	181
1993/94 F	NA	NA	NA	NA	NA
South Africa 3/					
1991/92	885	0	479	237	189
1992/93	848	0	448	237	181
1993/94 F	NA	NA	NA	NA	NA
Uruguay					
1991/92	259	0	87	45	127
1992/93	259	0	87	45	127
1993/94 F	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1991/92	19,937	11	980	13,219	5,749
1992/93	18,189	10	888	11,899	5,812
1993/94 F	NA	NA	NA	NA	NA
Grand Total					
1991/92	56,871	781	7,016	24,538	26,100
1992/93	60,338	732	6,842	25,279	28,945
1993/94 F	NA	NA	NA	NA	NA

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

(1,000 METRIC TONS)

Table 2 SWEET ORANGES

Country/Year 1/	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	168	0	94	54	20
1992/93	160	0	75	57	28
1993/94 F	165	0	80	60	25
Egypt					
1991/92	1,694	0	108	8	1,578
1992/93	1,771	0	250	8	1,513
1993/94 F	1,700	0	200	10	1,490
Gaza 4/					
1991/92	87	0	81	0	6
1992/93	87	0	81	0	6
1993/94 F	87	0	81	0	6
Greece					
1991/92	820	2	270	172	380
1992/93	872	0	340	170	362
1993/94 F	800	0	280	155	365
Israel					
1991/92	513	38	169	312	70
1992/93	377	25	111	205	86
1993/94 F	500	35	160	295	80
Italy					
1991/92	1,842	0	133	790	819
1992/93	2,111	2	128	600	1,393
1993/94 F	2,030	15	125	750	1,155
Morocco					
1991/92	780	0	342	43	395
1992/93	874	0	323	89	462
1993/94 F	990	0	355	107	528
Spain					
1991/92	2,851	0	1,237	342	1,072
1992/93	2,989	3	1,148	370	1,474
1993/94 F	2,404	0	1,100	225	1,078
Turkey					
1991/92	830	7	81	83	683
1992/93	820	6	40	83	703
1993/94 F	800	5	40	80	685
Subtotal Mediterranean Basin					
1991/92	9,385	47	2,495	1,804	5,133
1992/93	10,061	36	2,496	1,582	6,019
1993/94 F	9,476	55	2,421	1,682	5,428
Other Northern Hemisphere					
Cuba					
1991/92	428	0	17	82	329
1992/93	425	0	17	80	328
1993/94 F	425	0	30	70	325
Japan					
1991/92	37	170	0	2	205
1992/93	39	163	0	2	200
1993/94 F	35	170	0	2	203
China					
1991/92	929	0	5	37	887
1992/93	1,070	0	6	42	1,022
1993/94 F	1,190	0	7	59	1,124
Mexico					
1991/92	2,100	1	10	150	1,941
1992/93	2,700	1	3	150	2,548
1993/94 F	2,530	1	3	180	2,348
United States 5/					
1991/92	8,178	16	495	6,203	1,496
1992/93	10,071	10	556	7,887	1,638
1993/94 F	9,449	15	555	7,300	1,609
Subtotal Other Northern Hemisphere					
1991/92	11,872	187	527	6,474	4,653
1992/93	14,305	174	582	8,161	5,536
1993/94 F	13,629	186	595	7,611	5,406
Total Northern Hemisphere					
1991/92	21,057	234	3,022	8,278	8,786
1992/93	24,366	210	3,078	9,743	11,555
1993/94 F	23,105	241	3,016	9,293	10,834
Southern Hemisphere					
Argentina					
1991/92	640	0	73	200	367
1992/93	600	0	63	170	367
1993/94 F	NA	NA	NA	NA	NA
Australia					
1991/92	595	5	83	344	173
1992/93	553	5	75	326	157
1993/94 F	NA	NA	NA	NA	NA
Brazil					
1991/92	14,974	0	82	11,670	3,222
1992/93	13,300	0	82	10,118	3,100
1993/94 F	NA	NA	NA	NA	NA
Chile					
1991/92	117	0	1	0	116
1992/93	117	0	1	0	116
1993/94 F	NA	NA	NA	NA	NA
South Africa 3/ 6/					
1991/92	712	0	387	175	160
1992/93	677	0	364	168	145
1993/94 F	NA	NA	NA	NA	NA
Uruguay					
1991/92	130	0	50	23	57
1992/93	130	0	50	23	57
1993/94 F	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1991/92	17,168	5	676	12,412	4,085
1992/93	15,377	5	635	10,805	3,942
1993/94 F	NA	NA	NA	NA	NA
Grand Total					
1991/92	38,225	239	3,698	20,890	13,871
1992/93	39,743	215	3,713	20,548	15,497
1993/94 F	NA	NA	NA	NA	NA

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)

Table 3 TANGERINES
Country/Year 1/

	Production	Imports	Exports	Processed	Consumption 2/
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1991/92	11	0	5	1	5
1992/93	11	0	5	1	5
1993/94 F	11	0	5	1	5
Egypt					
1991/92	298	0	0	2	296
1992/93	340	0	0	3	337
1993/94 F	300	0	0	3	297
Gaza 4/					
1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0
Greece					
1991/92	73	0	11	2	60
1992/93	77	0	16	2	59
1993/94 F	75	0	13	2	60
Israel					
1991/92	127	0	29	37	61
1992/93	115	0	29	36	50
1993/94 F	130	0	35	35	60
Italy					
1991/92	428	5	13	63	357
1992/93	500	5	27	40	438
1993/94 F	460	6	25	47	394
Morocco 7/					
1991/92	280	0	166	0	114
1992/93	317	0	160	1	156
1993/94 F	325	0	150	10	165
Spain					
1991/92	1,340	0	905	202	233
1992/93	1,521	0	993	125	403
1993/94 F	1,589	0	1,050	125	414
Turkey					
1991/92	390	0	146	39	205
1992/93	390	0	91	39	260
1993/94 F	370	0	90	37	243
Subtotal Mediterranean Basin					
1991/92	2,947	5	1,275	346	1,331
1992/93	3,271	5	1,321	247	1,708
1993/94 F	3,260	6	1,368	260	1,638
Other Northern Hemisphere					
Cuba					
1991/92	11	0	0	0	11
1992/93	15	0	0	0	15
1993/94 F	15	0	0	0	15
Japan 8/					
1991/92	1,887	0	13	317	1,537
1992/93	2,019	0	12	396	1,611
1993/94 F	1,792	0	13	282	1,517
China					
1991/92	3,457	0	42	102	3,313
1992/93	3,990	0	59	114	3,817
1993/94 F	4,420	0	65	126	4,229
Mexico					
1991/92	165	0	12	18	135
1992/93	185	0	9	18	158
1993/94 F	170	0	10	18	142
United States 9/					
1991/92	342	19	20	117	224
1992/93	352	18	15	134	221
1993/94 F	409	13	20	155	247
Subtotal Other Northern Hemisphere					
1991/92	5,842	19	87	554	3,683
1992/93	6,581	18	95	682	4,211
1993/94 F	6,806	13	108	561	4,633
1991/92	8,789	24	1,362	900	6,551
1992/93	9,832	23	1,416	909	7,530
1993/94 F	10,066	19	1,476	821	7,788
Southern Hemisphere					
Argentina					
1991/92	220	0	27	25	168
1992/93	230	0	28	30	172
1993/94 F	NA	NA	NA	NA	NA
Australia					
1991/92	47	0	7	6	34
1992/93	49	0	7	6	36
1993/94 F	NA	NA	NA	NA	NA
Brazil 10/					
1991/92	605	0	8	120	477
1992/93	535	0	8	120	407
1993/94 F	NA	NA	NA	NA	NA
Chile					
1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA
South Africa					
1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA
Uruguay					
1991/92	66	0	16	5	45
1992/93	66	0	16	5	45
1993/94 F	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1991/92	938	0	58	156	724
1992/93	880	0	59	161	660
1993/94 F	NA	NA	NA	NA	NA
Grand Total					
1991/92	9,727	24	1,420	1,056	7,275
1992/93	10,712	23	1,475	1,070	8,190
1993/94 F	NA	NA	NA	NA	NA

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)

Table 4 LEMONS

Country/Year 1/ Northern Hemisphere Mediterranean Basin	Production	Imports	Exports	Processed	Consumption 2/
Cyprus					
1991/92	58	0	37	10	11
1992/93	48	0	30	8	10
1993/94 F	45	0	30	5	10
Egypt					
1991/92	5	0	0	1	4
1992/93	4	0	0	1	3
1993/94 F	5	0	0	1	4
Gaza					
1991/92	8	0	7	0	1
1992/93	8	0	7	0	1
1993/94 F	8	0	7	0	1
Greece					
1991/92	120	4	30	18	76
1992/93	119	0	49	18	52
1993/94 F	135	0	58	22	55
Israel					
1991/92	36	6	9	15	18
1992/93	18	1	2	2	15
1993/94 F	35	5	10	12	18
Italy					
1991/92	713	0	32	195	486
1992/93	752	0	22	250	480
1993/94 F	805	10	21	255	539
Morocco					
1991/92	20	0	0	0	20
1992/93	20	0	1	1	18
1993/94 F	20	0	0	1	19
Spain					
1991/92	555	0	324	89	142
1992/93	737	0	313	125	299
1993/94 F	570	0	300	125	145
Turkey					
1991/92	429	0	199	43	187
1992/93	420	5	90	42	293
1993/94 F	400	5	100	40	265
Subtotal Mediterranean Basin					
1991/92	1,944	10	638	371	945
1992/93	2,126	6	514	447	1,171
1993/94 F	2,023	20	526	461	1,056
Other Northern Hemisphere					
Cuba					
1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0
Japan					
1991/92	2	94	0	0	96
1992/93	2	90	0	0	92
1993/94 F	2	90	0	0	92
China					
1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0
Mexico					
1991/92	5	1	0	5	1
1992/93	5	1	0	5	1
1993/94 F	5	1	0	5	1
United States					
1991/92	695	9	132	280	292
1992/93	844	7	130	416	305
1993/94 F	937	7	135	375	334
Subtotal Other Northern Hemisphere					
1991/92	702	104	132	285	293
1992/93	851	99	130	421	306
1993/94 F	844	98	135	380	335
Total Northern Hemisphere					
1991/92	2,648	114	770	656	1,238
1992/93	2,977	104	644	868	1,477
1993/94 F	2,867	118	661	841	1,391
Southern Hemisphere					
Argentina					
1991/92	520	0	71	384	85
1992/93	560	0	42	430	88
1993/94 F	NA	NA	NA	NA	NA
Australia					
1991/92	35	2	1	19	17
1992/93	31	2	2	16	15
1993/94 F	NA	NA	NA	NA	NA
Brazil	11/				
1991/92	53	0	3	50	0
1992/93	53	0	3	50	0
1993/94 F	NA	NA	NA	NA	NA
Chile					
1991/92	70	0	5	0	65
1992/93	70	0	5	0	65
1993/94 F	NA	NA	NA	NA	NA
South Africa 3/					
1991/92	60	0	31	20	9
1992/93	64	0	26	20	8
1993/94 F	NA	NA	NA	NA	NA
Uruguay					
1991/92	52	0	20	15	17
1992/93	52	0	20	15	17
1993/94 F	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1991/92	790	2	131	468	193
1992/93	820	2	98	531	193
1993/94 F	NA	NA	NA	NA	NA
Grand Total					
1991/92	3,436	116	901	1,124	1,431
1992/93	3,797	106	742	1,399	1,670
1993/94 F	NA	NA	NA	NA	NA

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)

Table 5 GRAPEFRUIT

Country/Year 1/
Northern Hemisphere, Mediterranean Basin

Cyprus

	Production	Imports	Exports	Processed	Consumption 2/
1991/92	113	0	78	33	2
1992/93	110	0	70	35	5
1993/94 F	112	0	72	35	5

Egypt

1991/92	2	0	0	1	1
1992/93	2	0	0	1	1
1993/94 F	3	0	0	1	2

Gaza

1991/92	9	0	7	0	2
1992/93	9	0	7	0	2
1993/94 F	9	0	7	0	2

Greece

1991/92	7	0	1	1	5
1992/93	8	0	1	1	6
1993/94 F	7	0	1	1	5

Israel

1991/92	345	5	120	210	20
1992/93	383	7	111	269	20
1993/94 F	380	6	120	245	20

Italy

1991/92	6	43	1	0	48
1992/93	6	39	2	0	43
1993/94 F	7	37	2	0	42

Morocco

1991/92	3	0	0	2	1
1992/93	3	0	0	2	1
1993/94 F	3	0	0	2	1

Spain

1991/92	25	0	12	2	11
1992/93	25	0	12	2	11
1993/94 F	25	0	12	2	11

Turkey

1991/92	42	0	34	4	4
1992/93	40	1	26	4	12
1993/94 F	38	0	26	4	9

Subtotal Mediterranean Basin

1991/92	662	48	253	253	94
1992/93	586	47	228	304	101
1993/94 F	584	42	239	290	97

Other Northern Hemisphere

Cuba	271	0	80	94	97
1991/92	307	0	28	138	141
1992/93	307	0	40	130	137

Japan

1991/92	0	267	0	0	257
1992/93	0	239	0	0	239
1993/94 F	0	245	0	0	245

China

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0

Mexico

1991/92	110	0	1	30	79
1992/93	118	0	1	33	84
1993/94 F	120	0	1	34	85

United States

1991/92	2,018	11	459	885	685
1992/93	2,541	12	441	1,381	731
1993/94 F	2,329	12	470	1,140	731

Subtotal Other Northern Hemisphere

1991/92	2,399	268	540	1,009	861
1992/93	2,986	251	470	1,552	956
1993/94 F	2,756	267	511	1,304	953

Total Northern Hemisphere

1991/92	2,951	316	793	1,262	1,212
1992/93	3,552	298	698	1,856	1,298
1993/94 F	3,340	299	750	1,594	1,295

Southern Hemisphere

Argentina	170	3	46	55	72
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1992/93	180	2	30	65	87
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1993/94 F	NA	NA	NA	NA	NA
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Australia

1991/92	27	1	1	16	11
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1992/93	31	1	1	18	13
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1993/94 F	NA	NA	NA	NA	NA
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Brazil

1991/92	25	0	2	22	1
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1992/93	25	0	2	22	1
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1993/94 F	NA	NA	NA	NA	NA
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Chile

1991/92	0	0	0	0	0
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1992/93	0	0	0	0	0
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1993/94 F	NA	NA	NA	NA	NA
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South Africa 3/

1991/92	113	0	61	42	10
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1992/93	115	0	58	49	8
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1993/94 F	NA	NA	NA	NA	NA
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Uruguay

1991/92	11	0	1	2	8
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1992/93	11	0	1	2	8
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1993/94 F	NA	NA	NA	NA	NA
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Total Southern Hemisphere

1991/92	346	0	110	137	99
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1992/93	362	0	91	156	115
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1993/94 F	NA	NA	NA	NA	NA
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Grand Total

1991/92	3,297	316	903	1,399	1,311
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1992/93	3,914	298	789	2,012	1,411
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1993/94 F	NA	NA	NA	NA	NA
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Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
(1,000 METRIC TONS)

Table 6 OTHER CITRUS

Country/Year 1/
Northern Hemisphere, Mediterranean Basin

Cyprus

	Production	Imports	Exports	Processed	Consumption 2/
1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0

Egypt 12/

1991/92	421	0	4	3	414
1992/93	385	0	4	3	378
1993/94 F	425	0	6	3	416

Gaza

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0

Greece 13/

1991/92	4	0	0	2	2
1992/93	4	0	0	2	2
1993/94 F	5	0	0	2	3

Israel

1991/92	21	0	5	5	11
1992/93	7	0	5	0	2
1993/94 F	20	0	6	2	12

Italy 14/

1991/92	34	0	0	34	0
1992/93	37	0	0	37	0
1993/94 F	37	0	0	37	0

Morocco

1991/92	7	0	0	0	7
1992/93	11	0	2	0	9
1993/94 F	12	0	1	0	11

Spain 15/

1991/92	13	0	0	12	1
1992/93	18	0	0	15	1
1993/94 F	10	0	0	9	1

Turkey 15/

1991/92	4	0	0	3	1
1992/93	4	0	0	3	1
1993/94 F	4	0	0	3	1

Subtotal Mediterranean Basin

1991/92	504	0	9	59	436
1992/93	484	0	11	60	393
1993/94 F	513	0	13	56	444

Other Northern Hemisphere

Cuba 12/

1991/92	48	0	5	0	43
1992/93	27	0	3	0	24
1993/94 F	27	0	3	0	24

Japan 16/

1991/92	161	0	0	6	155
1992/93	159	0	0	3	156
1993/94 F	158	0	0	3	153

China

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	0	0	0	0	0

Mexico 17/

1991/92	714	1	70	135	510
1992/93	730	1	100	130	501
1993/94 F	720	1	85	135	501

United States 17/

1991/92	84	81	5	21	119
1992/93	40	86	4	11	111
1993/94 F	40	90	4	11	115

Subtotal Other Northern Hemisphere

1991/92	987	82	80	162	872
1992/93	956	87	107	144	636
1993/94 F	943	91	92	149	640

Total Northern Hemisphere

1991/92	1,491	82	89	221	1,108
1992/93	1,420	87	118	204	1,029
1993/94 F	1,456	91	105	205	1,084

Southern Hemisphere

Argentina

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA

Australia

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA

Brazil 18/

1991/92	695	0	4	46	645
1992/93	750	0	4	46	700
1993/94 F	NA	NA	NA	NA	NA

Chile

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA

South Africa

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA

Uruguay

1991/92	0	0	0	0	0
1992/93	0	0	0	0	0
1993/94 F	NA	NA	NA	NA	NA

Total Southern Hemisphere

1991/92	695	0	4	46	645
1992/93	750	0	4	46	700
1993/94 F	NA	NA	NA	NA	NA

Grand Total

1991/92	2,188	82	93	287	1,753
1992/93	2,170	87	122	250	1,729
1993/94 F	NA	NA	NA	NA	NA

Horticultural & Tropical Products Division, FAS/USDA. See footnotes on page 23. Production Estimates and Crop Assessment Division, FAS/USDA.

Footnotes for Citrus tables on pages 17 - 22

--Indicates zero, negligible, or not available.

- 1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons and limes usually begins earlier and often extends throughout the year.
- 2/ In Greece, Italy and Spain "consumption" includes fruit withdrawn from the market under the European Community price support program.
- 3/ Includes Swaziland plus very small quantities of citrus from Botswana, Mozambique and Zimbabwe which is marketed through the South African Citrus Board.
- 4/ Tangerine production is small and is included with oranges.
- 5/ Includes temples.
- 6/ Includes small quantity of tangerines.
- 7/ Clementines only.
- 8/ Mainly satsumas (also called mandarin or unshu mikan), but also including mandarin hybrids.
- 9/ Includes tangelos, which account for about half of combined tangerine and tangelo production. Export data include mandarins.
- 10/ State of Sao Paulo only, which apparently accounts for over one-half of Brazil's production. About 120,000 tons of tangerines which are processed are included in the orange table.
- 11/ State of Sao Paulo only.
- 12/ Mostly limes but some sour oranges and other varieties.
- 13/ Citrons and sour oranges.
- 14/ Mostly bergamots.
- 15/ Sour oranges.
- 16/ Summer Oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).
- 17/ Limes.
- 18/ Limes, state of Sao Paulo only, which apparently accounts for roughly 80 percent of Brazil's lime production.

SOURCES: National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attachés or USDA estimates for all other countries.

Chilean Asparagus Situation

The production of fresh asparagus in Chile in 1993/94 is forecast to reach 17,000 tons, up slightly from the previous season. Over the past 5 years, area planted to asparagus in Chile has fallen from 7,000 hectares in 1990/91 to 4,200 hectares this season. The drop in production has occurred primarily as a result of low prices associated with growing competition from other Latin American producers (mainly Peru).

Reduced prices have forced marginal Chilean asparagus producers to search for more profitable crops. Remaining growers have decreased their use of inputs, which probably

exacerbated quality problems last season. However, greater demand led to better cultural practices and improved yields for this season's crop.

Asparagus is planted from central to the south-central region of the country (Region V through Region X). The principal production regions are Chillan (Region VIII) and the Metropolitan Region. The predominant varieties all originated from California and include UC 72, UC 157 and UC 157-F2, which account for over 90 percent of total planted area.

Chile: Asparagus Area and Production

	1989/90	1990/91	1991/92	1992/93	1993/94
Planted Area (HA)	4,786	6,960	5,940	4,638	4,238 F
Production (MT)	10,440	17,820	16,233	16,952	17,000 F

Source: Chilean Ministry of Agriculture.

Note: F = Forecast.

Asparagus production in Chile has traditionally been export-oriented, although recently there has been an increase in domestic demand, especially for processing asparagus. It is estimated that 55 percent of the crop is exported fresh and frozen, and around 20 percent is purchased by the processing industry. The remainder goes for fresh domestic consumption.

Fresh asparagus from Chile is exported from September through January, mainly to the United

States and the EU (European Union), formerly the EC. The most important EU destinations are Italy, France, the United Kingdom, and Spain. Exports of canned asparagus have only registered a slight increase over the past three years. During these three years of canned pack exports, the United States, Spain, Italy, and Argentina have been the primary markets. Frozen asparagus is exported mainly to Europe and Japan.

Chile: Fresh, Frozen, and Canned Asparagus Exports

Years	Fresh MT	Fresh \$1,000	Frozen 1/ MT	Frozen 1/ \$1,000	Canned MT	Canned \$1,000
1989	2,879	\$4,891	769	\$1,744	653	\$1,216
1990	3,731	\$6,507	1,596	\$2,615	434	\$848
1991	3,122	\$5,972	2,680	\$4,041	392	\$850
1992	2,149	\$5,004	3,000	\$5,110	397	\$909
1993E	2,100	-	3,200	-	400	-

1/ No separate statistics for frozen asparagus; figures are estimates.

Note: E = Estimate. Source: Chilean Ministry of Agriculture.

Chile: Fresh Asparagus Exports, Calendar Year (Metric tons)

Country of Destination	1991	1992
United States	2,329	1,186
Italy	293	205
United Kingdom	153	130
France	112	188
Spain	101	129
Germany	42	35
Canada	11	166
Others	81	110
Total	3,122	2,149

Source: Chilean Ministry of Agriculture.

(Emanuel McNeil, 202-720-2083)

U.S. Walnut Marketing and Exports

The United States is now one of the premier walnut producers in the world, but it was not always that way. Walnuts, native to Europe and Asia, were introduced to California in the 18th century by Spanish missionaries. It was not until the 1860's, however, that the walnut industry was launched by Joseph Sexton, the first California nurseryman to produce walnuts commercially. Through selective breeding, Sexton settled on varieties of walnuts that showed the greatest potential.

In the United States, commercial walnuts are grown exclusively in California. Early in the century, most walnuts were grown in the southern counties, but planted area shifted inland to the central valley in the 1950's. Today, the growing region stretches from Redding in the north to Barstow in the south and encompasses 181,000 acres. Over the past 5 years, annual walnut production has averaged 204,000 metric tons, inshell basis (all data in this article are reported on an inshell basis).

Walnut farming is very capital intensive, requiring significant amounts of fertilizer and time. The average tree bears fruit after 6 years but takes 12-14 years to mature. There are a variety of diseases and insects that can destroy a walnut crop, requiring close monitoring and some pesticide and fungicide use.

There are approximately 68 processing companies and 5,300 growers of walnuts in California. In addition to the many independent walnut growers, a growers' cooperative, Diamond Walnut Growers, Inc., is a major player in the marketplace. The California Walnut Board (CWB) and the California Walnut Commission (CWC) represent the interests of the entire walnut industry. The CWB is responsible for most domestic activities, including the management of check-off funding, crop estimates, etc. The CWC is the market promotion arm of the walnut industry, handling both domestic and international efforts.

The 1992/93 (August-July) walnut harvest was

one of the smallest on record with production totaling only 184,160 tons. The short crop strained both export and domestic markets. According to CWC data, shipments of walnuts to all destinations totalled 196,252 tons in 1992/93, 21 percent below the previous season's shipments. Constrained by the rising U.S. dollar against some European currencies and recession in many markets, total U.S. export shipments declined 19 percent to 65,628 tons in 1992/93. Nonetheless, exports accounted for approximately 36 percent of total California walnut shipments.

This year's crop may help to put the industry back on the right track. For 1993/94, U.S. walnut production is forecast to increase 23 percent over 1992/93 to 226,800 tons, and walnut exports are expected to recover some lost ground as well.

The Top U.S. Export Markets

The United States exports walnuts to more than 50 countries. However, the primary markets for U.S. walnuts are: Germany, Spain, Japan, Italy, Canada, Israel, and Australia. Most growth has been in the shelled sector, while inshell exports have remained steady (see figure 1.)

Germany is the largest export market for inshell walnuts, and the second largest export market for shelled walnuts. Shipments of U.S. inshell walnuts to Germany in 1992/93 were 12,685 tons, a decrease of 8 percent from 1991/92. On the shelled side, exports to Germany in 1992/93 rose almost 2 percent over 1991/92, reaching 3,509 tons.

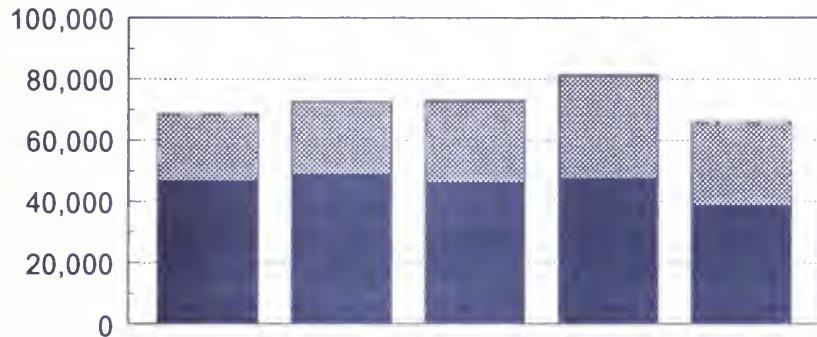
The German market for U.S. walnuts has experienced many changes over the last few years. Reunification and the flood of immigrants into Germany has put significant strains on the economy and has shaken the structure and organization of the marketplace. In addition, German importers decided in 1990 to stop importing bleached inshell walnuts. As a result, German nut traders, who used to import U.S.

walnuts and re-export them to points throughout Europe, find their re-export business limited in those markets, where bleached walnuts are still preferred.

Over 70 percent of all U.S. walnut exports to Germany are shipped during October and November, since traditionally Germans purchase walnuts during the Advent or Christmas season for holiday decoration and recipes. U.S. marketing efforts have focused primarily on that season. Recently, however, younger Germans have begun to break away from the old traditions and walnut sales have weakened. To recapture these lost customers, the CWC is redirecting its marketing efforts toward a health marketing campaign based on a recent university study on walnuts as part of a cholesterol lowering diet. Given the growing worldwide emphasis on eating better and healthier, this study fit right into the CWC's plans not only for Germany, but also for other markets.

Worldwide Exports of U.S. Walnuts

(Metric Tons, Inshell basis)



Source: California Walnut Commission

Spain is one the U.S. industry's premier markets. Unlike most other markets, walnuts are consumed as a snack and can be found on supermarket shelves year round. Still, the

primary selling season is October to January.

Although Spain is the second largest market for U.S. inshell walnuts, recent economic problems have stifled the expansion of consumption. In 1992/93, inshell walnut exports to Spain declined to 10,494 tons, off more than 8 percent from the previous year. Shelled walnut exports to Spain fell even more dramatically in 1992/93 to 1,321 tons, 54 percent below the previous year.

The Spanish market is currently in the process of transformation. Until recently, three major importers represented 90 percent of walnut distribution in Spain. To penetrate the market, it was important to work closely with the top distributors. However, the large devaluation of the Spanish peseta in 1992/93 caused one of the three major importers to drop out of the market. Furthermore, smaller retail markets and supermarket chains have expressed an interest in buying direct. These changes may indicate that the market may fragment.

Japan is the largest U.S. shelled walnut market, purchasing 9,176 tons of U.S. product in 1992/93, 8 percent above the 1991/92 level. Approximately 75 percent of all shelled U.S. walnuts imported by Japan are used in the industrial sector; the remaining 25 percent is re-bagged and sold to the consumer as a snack.

Japan is truly one of the great success stories for walnuts. Although Japan grows the "kurumi" variety, walnut consumption is not an integral part of the Japanese diet. Kurumi production is only 400 tons per year and consumption is limited to ceremonial purposes. Therefore, the U.S. walnut

industry faces two major constraints to sales: 1) to differentiate the California walnut from the Japanese kurumi, and 2) to break the image of the walnut as a ceremonial food. The U.S. industry is attacking these constraints on two fronts. First, it is publicizing the California walnut as a contemporary food ingredient of high nutritional value, with emphasis on using the walnut in the traditional diet as well as in popular western foods. The health study mentioned above will be used to augment this strategy. Second, the industry is promoting the walnut to the industrial sector as a high value ingredient that can add both value and variety to baked and manufactured goods.

The Italian market has been one of the most volatile in Europe. U.S. inshell walnut exports to Italy in 1992/93 dropped to 5,349 tons compared with 10,589 tons shipped the year before. The devaluation of the lira following Italy's withdrawal from the European Union's system of linked exchange rates in September 1992 raised U.S. walnut prices sharply. Moreover, the Italian walnut crop, due to weather problems, had to be pushed into the market early, further depressing U.S. sales.

Shipments of U.S. walnuts to Canada have bounced up and down over the last few years, ranging from 1,900 tons to 3,200 tons. U.S. exports in 1992/93 totaled 2,793 tons, a 33 percent decline from the previous year, due to a short U.S. walnut crop. The United States dominates the Canadian inshell market but faces keen competition from China in the shelled market.

The Canadian market poses challenges for the marketing of U.S. walnuts. First, Canada has a highly concentrated retail sector. Six major companies control over 66 percent of consumer grocery sales. By contrast, in the United States, the top 14 grocery companies control only 30 percent of sales. Many of the Canadian grocery chains retain control in the head office, making it difficult for manufacturers and distributors to market their products on a local level. Therefore, strong relationships with all the major companies is key to effective marketing in Canada.

The common practice of selling nuts in bulk at the retail level presents a challenge for merchandising U.S. branded walnuts. Also, home baking is on the decline due to time constraints imposed on the higher percentage of working women.

Israel is a Mediterranean country with a long history of nut consumption, both as a snack and in religious uses. It has small almond and pecan industries, though reportedly the tree nut area is gradually being replaced by more profitable crops.

Exports of U.S. walnuts to Israel have grown steadily over the years. In 1986/87 total U.S. exports were 1,250 tons. U.S. walnut exports were a record in 1991/92 at 4,261 tons, but declined 53 percent in 1992/93 to 2,029 tons. The severe downturn was a result of the short California crop and readily available supplies of walnuts and other nutmeats from competing sources

The rebagging and retail trades in Israel are relatively unsophisticated. Rebaggers generally do not have the capability to vacuum pack or nitrogen pack, making quick inventory turnover essential if retailers are to sell fresh product. Furthermore, the retail trade is very fragmented with a high percentage of nut sales emanating from "Mom and Pop" shops of 15-20 square meters.

This structure of "Mom and Pop" shops both helps and hinders marketing efforts. Merchandising is difficult because of the many different owners and shopkeepers. However, these shopkeepers are much more flexible than the large supermarkets may be and are willing to work with the industry to get the word out.

Australia's tradition of nut and dried fruit consumption resulted from the tremendous influx of people from the Mediterranean in the 1940's and 50's. Recently, immigrants from Asia have also brought their nut consumption habits to Australia.

Only a few years ago, the Australian walnut market was dominated by less expensive Indian

and Chinese product. However, close cooperation between the U.S. industry and the major nut rebaggers and distributors, and a sustained consumer advertising campaign emphasizing the quality of U.S. nuts generated success for the U.S. product in Australia. In 1986, shelled U.S. walnut exports to Australia were 740 tons and the United States held a 33 percent share. In 1991, exports jumped to 3,642 tons and the U.S. share jumped to 69 percent. In 1992, as a result of the short U.S.

crop, shelled exports dropped considerably to 1,686 tons but market share remained above 50 percent. The fact that U.S. market share remained high indicates an overall easing of Australian demand, rather than a loss of sales to other supplier countries.

(Steve Shnitzler, 202 720-8495)

**SHIPMENTS OF U.S. WALNUTS TO
SELECTED COUNTRIES, 1991/92 - 1992/93 1/
(1,000 Metric Tons, Inshell Basis)**

Country	1991/92		1992/93		1991/92 Total	1992/93 Total	Percent Change
	Inshell	Shelled ^{2/}	Inshell	Shelled ^{2/}			
Canada	1,305	2,937	848	1,945	4,242	2,793	-34%
Australia	231	3,642	166	1,686	3,873	1,852	-52%
Japan	461	8,450	550	9,176	8,911	9,726	+9%
Germany	13,797	3,453	12,685	3,509	17,250	16,194	-6%
Italy	10,589	196	5,349	64	10,785	5,413	-50%
Spain	11,481	2,893	10,494	1,321	14,374	11,815	-18%
Israel	311	3,950	139	1,890	4,261	2,029	-52%
Others	8,897	8,570	8,269	7,537	17,467	15,806	-10%
Total	47,072	34,091	38,500	27,128	81,163	65,628	-19%

1/ Marketing year: August-July.

2/ Weight based on inshell equivalent.

Source: California Walnut Commission.
Marketing Year: August-July.

The Red Tart Cherry Industry in the United States

Cherry trees are native to both the Asian and European continents, but records show that the domestication of cherry trees began about 4,000 years ago in China. The North American cherry industry began in the early 17th century when European settlers began to plant trees along the St. Lawrence river and around the Great Lakes. The first true cherry orchard in the United States was planted in 1852 by Peter Dougherty, a Presbyterian missionary, in the Grand Traverse area of Michigan. Today, there are more than two million trees in the Grand Traverse area, and Traverse City, in the heart of the region has been dubbed the "Cherry Capital of the World."

There are two types of cherries grown in the United States, sweet and tart. Sweet cherries are grown primarily in the western states of Washington, Oregon, and California, whereas red tart cherry production is concentrated in Michigan with smaller growing areas in New York, Pennsylvania, Utah, Wisconsin, and Colorado. Of the tart cherries, the main variety grown is the French Montmorency, a variety that is now grown throughout the world.

Cherry trees generally begin to bear about 5 years after planting and continue to produce for 20-25 years. On average tart cherry orchards in the United States produce 2,700 - 4,500 kilograms per acre.

World Situation

Worldwide cherry production (both sweet and tart) is approximately 1.2 million metric tons, with about 20 percent of this total grown in North America, 71 percent in Europe, 7 percent in Asia, 1.5 percent in South America and 0.5 percent in Oceania. Most of the European production is centered in Russia, Turkey, Hungary, and until recently the Balkan states.

Due to low-tech growing and harvesting techniques and poor infrastructure, Russia has never played a significant role in international trade. Hungary is now a major exporter of red tart cherries. It has

taken over the role of the former Yugoslav states, which before the civil strife began, was one of the primary suppliers of cherries to the European Union. Turkey, which produces 16 percent of world supply, is also a significant supplier. Germany produces 12 percent of world production but remains a net importer of red tart cherries. Asian producers do not factor significantly in world trade as most countries use all they produce.

The U.S. Industry and Structure

Production of red tart cherries fluctuates from year to year, depending mostly on weather. From 1988 to 1991, U.S. production was lower than average, ranging from 107 million kilograms in 1988 to 50 million kilograms in 1991. In 1992, production reached a five year high of 152 million kilograms, up 77 percent from 1991 (see Figure 1). The 1993 crop is forecasted to total 149 million kilograms. There are approximately 2,500 growers of tart cherries in the United States, nearly all of which are owner-operators. While orchards are getting fewer and larger, small to medium size farms of 30 to 200 acres still dominate the industry.

Almost all red tart cherries go to processing and are converted into pie stock (still the most

U.S. Tart Cherry Production



Figure 1

popular use of tart cherries), jellies, dessert fillings, frozen cherry pies, and various confectionery products. The processing of cherries is done primarily by farmer cooperatives and individual grower processors. The market channels for frozen cherries and canned cherries are different. In the main, frozen cherries are sold to large food manufacturers as an ingredient. Very few frozen cherries are sold to consumers. The cherries are used for fillings and flavorings and then are sold to the consumer in the finished product form, usually under a brand name. Market channels for canned cherries, especially to the retail sector, are simpler because there is no intermediate processing stage. On the retail side, canned cherries are sold to large grocery wholesalers and are sold under private label or under packer label. There is no true national brand in the United States. Some canned cherries are sold for institutional and bakery use. The canned market has been declining over the last few years as more manufacturers and bakers prefer frozen product.

Export Markets

The importance of export markets is growing. Due to the extreme fluctuations in production from year to year, the percentage of the production that is exported is difficult to determine. However, production, in combination with carry-over stocks, usually exceeds domestic demand, ensuring a good supply of cherries for export markets.

The rise in exports has been phenomenal (see Figure 2). Exports of canned and frozen tart cherries have increased 214 percent from fiscal 1989 to 1993. This really does not tell the whole story because much of what is exported is shipped in the form of juice and/or juice concentrate, which is not broken out in the U.S. export statistics. Canned

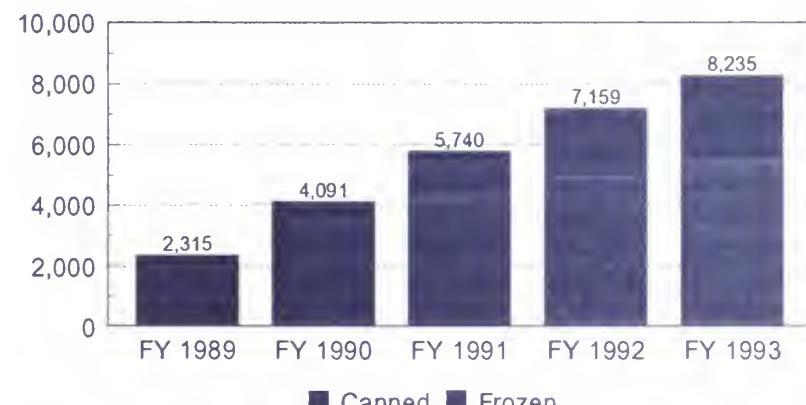
product exports increased 173 percent from 1989 to 1993, and frozen product exports increased 846 percent in the same period. This change in exports is a result of the development of new markets, like Japan, and civil strife in former Yugoslavia.

Germany was the top market for U.S. tart cherries in fiscal 1993, importing over \$2.9 million, a 64-percent increase over last year. Germany is the largest consumer and one of the largest producers of tart cherries in the world. Despite domestic production, Germany is not able to meet domestic needs. Traditionally, Germany imported sour cherries from Yugoslavia, a source that has been cut off since 1991. In 1993, Germany turned toward the United States, Turkey and Hungary to meet its needs, importing \$425,000 of frozen product and \$2.5 million of canned cherries. In fact, Germany had not imported frozen cherries from the United States since 1989. Whether this trend will continue is unknown as Russia, the largest cherry producer in the world, is in the market for new pitting equipment that would make their product more exportable, with the possibility of eventually displacing U.S. product. Also, Hungarian production is increasing and may affect world trade patterns. Despite the gains in the German market last year, U.S. cherries still face considerable barriers to trade in the European

U.S. Tart Cherry Exports

Fiscal Year (October-September)

Thousands of Dollars



Source: U.S. Department of Commerce
Bureau of Census

Figure 2

Union; these include minimum import prices and duties ranging from 18 to 26 percent ad valorem. In the past, the European Union granted Yugoslavia preferential access and now has granted Turkey duty-free access under a bilateral preference scheme.

This pattern was repeated elsewhere within the EU. The Netherlands imported \$895,000 of canned product in fiscal 1993, a 34-percent increase over 1992. Belgium and Luxembourg imported \$836,000 of frozen product in 1993. The last time either of these countries had imported U.S. frozen tart cherries was in 1989.

Canada traditionally has been the top market for U.S. sour cherries. In fiscal 1991 and 1992 Canada imported over \$2 million of canned and frozen cherries per year. In 1993, Canada imported \$2.1 million, a 4-percent increase over 1992. Canada produces small amounts of tart cherries but not enough to meet demand. Again, the U.S. cherry industry faces barriers to trade which aid Canadian processors. Until recently, Canada restricted imports of frozen cherries to 2 kilograms per pack, an uneconomical package size. On November 3, the Government of Canada revised its packaging requirements for processed products, giving American exporters somewhat improved access to the food service trade. Now containers up to 20 kilograms (44 pounds) can be used.

However, there are some problems with the new regulations. They have created burdensome labeling requirements (inner containers of multi-packages must meet all retail labeling standards), package size restrictions (must be a multiple of 500 grams), and discriminatory treatment for importers (Canadian firms have a two year exemption from the new requirements while importers do not, and importers must have written pre-clearance from Agriculture Canada while Canadian firms do not need pre-clearance). Furthermore, the U.S. industry has indicated that there is no known adhesive that will allow labels to stick to the frozen inner containers.

Japan is the true growth market for U.S. tart cherries. Total exports skyrocketed to \$1.9 million in fiscal 1992, an increase of 97 percent since 1989. U.S. exports declined in 1993 by 46 percent to \$999,000 but this still is well

above the historical levels of \$500,000 to \$600,000. Most of the increase has taken place in the frozen cherry sector. In 1992, frozen red tart cherry exports to Japan totalled \$772,000, an increase of 1380 percent over 1991. Moreover, canned red tart cherry exports grew to a record \$967,000 in 1992, an increase of 107 percent over last year. Fiscal year 1993 values show a decrease of 40 percent for frozen product and 50 percent for canned as compared to 1992.

The incredible increase in exports of red tart cherry products is primarily driven by a booming demand for cherry pie. This recent craze for cherry pie is thought to be the result of the popularity of the U.S. television series, "Twin Peaks," in which characters regularly stop by a local diner for a slice of cherry pie. Capitalizing on this trend, the Cherry Marketing Institute (CMI) has used Market Promotion Program funds in Japan to support tart cherry sales. CMI is working with various Japanese food manufacturers, bakeries and confectioners and in 1992, over 30,000 retail outlets offered some form of cherry pie to their customers. Furthermore, they have gone beyond the limits of cherry pie and have successfully developed new products and applications for red tart cherries in Japan. In 1992, several new products were introduced, including a cherry beverage, a cherry chewing gum, and a cherry candy.

The decrease in 1993 is seen as a natural settling of the market. Industry sources believe that while the Twin Peaks phenomenon was just a fad, it served to introduce the product to the public very quickly. It is hoped that now Japan can develop into a steady cherry pie market.

With the good crop in 1993, tart cherry exports are expected to continue the upward trend. However, many political and technological factors play large roles in world tart cherry trade. Therefore, it is important that the U.S. industry continue its efforts to develop strong overseas markets in order to overcome obstacles.

(Steve Shnitzler, 202 720-8495)

Production and Marketing of Canned Sweet Corn In Japan

The production of processed sweet corn in Japan in 1993 is forecast at 28,000 metric tons, down 15 percent from 1992. This reduction is the third consecutive year that Japan's sweet corn production has been down due to unfavorable weather. Cold temperatures and excessive rains during last summer were the primary factors for the 1993 shortfall. Because of this shortfall, Japanese canners did not achieve their planned

production goals. Industry sources forecast that canned sweet corn production for 1993 will be only about 2.62 million cases (28,000 tons, based on C4/24 cans), compared to planned output of about 3.29 million cases (36,000 tons).

Japan's sweet corn is produced solely in Hokkaido, the northern island.

Japan: Production, Supply and Distribution of Canned Sweet Corn (Metric Tons, Net Weight)

	1991	Prelim 1992	Forecast 1993
Beginning Stocks	0	0	3,000
Production	34,900	32,800	28,000
Net Production	23,400	22,000	19,300
Imports	36,300	45,600	47,500
Total Supply	71,200	78,400	78,500
Exports	0	0	0
Dom. Consumption	71,200	75,400	78,500
Ending Stocks	0	3,000	0
Total Distribution	71,200	78,400	78,500

Ending stocks for 1993 are projected to be nil, due to an expected shortage of domestic product, and steady demand. Although, given the high cost of storage in Japan, it is likely that future stock levels for canned sweet corn will remain a minor inventory item. In 1992, however, stocks built up somewhat as traders over-imported relative to actual consumption, which was lower than expected due to the economic recession.

The United States is by far the largest foreign supplier of canned sweet corn to Japan, accounting for over 90 percent of the total import market. Imports of canned sweet corn from all sources rose continuously from 1985, and reached a record level of 44,000 metric tons (4 million cases) in 1989, before leveling off. For 1993, imports of canned sweet corn are forecast to reach 47,500 tons, up 4 percent from 1992. This increase in imports is due not only to a shortfall in domestic production, but also to the high yen/dollar exchange rate. Reportedly, some

traders are concerned that higher prices may be on the horizon for imported product, due to a projected shortfall in the U.S. canned sweet corn pack cause by excessive rains and wet conditions in key Midwestern producing regions.

Japan's frozen sweet corn market depends heavily on imports, which accounts for approximately 60 percent of total consumption. Reportedly, imports will continue to increase gradually over the next several years, with the United States continuing as the primary supplier. In calendar years 1992 and 1991, Japan's imports of frozen sweet corn totaled 39,699 tons and 36,506 tons, respectively. However, during the first 9 months of 1993, imports of frozen sweet corn were down slightly compared to the previous year.

Japanese importers fear that since prices of 1993 crop of frozen sweet corn in the United

**Japanese Imports of Canned Sweet Corn, Calendar Year
(Metric tons)**

<u>Containing Added Sugar,</u> <u>Not Frozen</u>	1991	1992	Jan-Sept. 1993
United States	9,321	16,600	15,134
France	163	720	684
Canada	139	138	139
Australia	335	606	910
Others	65	14	61
Sub-total	10,023	18,078	16,928
 <u>Not Containing Added Sugar, Not Frozen</u>			
United States	25,582	26,944	23,146
New Zealand	307	554	467
Others	376	8	154
Sub-total	26,265	27,506	23,767
Grand Total	36,288	45,584	40,695

Source: Japanese Customs Bureau, Ministry of Finance

States are significantly higher than normal, they may not be able to fulfill their planned import goals. Given the current recession in Japan, importers are unable to easily pass on higher prices to their customers.

The food service industry and food processing sector are the major users in Japan of frozen sweet corn, accounting for over 80 percent of total consumption. Industry sources forecast that there will be no significant changes in this year's consumption of frozen corn, as the lingering economic recession has severely hampered growth in the food service industry, as well as the number of new products launched by manufacturers.

In both the restaurant and manufacturing sectors, sweet corn in Japan finds a variety of uses unknown in the United States, such as pizza topping. A significant amount of frozen

sweet corn is consumed by Japan's multimillion dollar "Ramen" (Chinese-style noodles) industry, both at noodle shops and in processing for dried ready-to-cook noodles. Retort food and freeze-dried food processing are also major areas of frozen sweet corn distribution.

The import duty on frozen sweet corn into Japan with added sugar, (HS code: 2004.90-110) is 17.5 percent, CIF basis; while the duty on frozen corn without added sugar (HS codes: 0710.40-000, 2004.90-230) is 12.5 percent, CIF basis.

Reportedly, many Japanese supermarkets and retail outlets are now using canned sweet corn as a leading sales promotion item, banking on both the lower yen to the dollar ratio to lower the price of imported product, and its popularity with shoppers.

(Emanuel McNeil, 202-720-2083)

U.S. Fresh Vegetables Export Situation

U.S. exports of fresh vegetables, including potatoes, continue to be a bright spot for horticultural product exports. Fresh vegetable exports in fiscal year 1993 totaled 1.7 million tons, valued at nearly \$1.0 billion, and were up 4 percent in volume and 15 percent in value from the previous year. Canada is the dominant market for U.S. vegetables, accounting for over 70 percent of total exports. Other important markets included Japan, Mexico, the EU (European Union, formerly known as the EC) and the Caribbean. Combined, these markets account for about 21 percent of total U.S. exports. U.S. exports to Japan were valued at \$106 million, accounting for 11 percent of total U.S. shipments. Mexico registered the biggest individual increase at 69 percent for 1993, compared to a year earlier.

U.S. fresh vegetable exports in 1994 should continue to increase with additional access to the NAFTA markets -- Canada and Mexico -- and as disposable incomes increase in these major U.S. export markets.

Of the fresh vegetable exports in 1993, lettuce, tomatoes, onions, and broccoli accounted for about 43 percent of total shipments. Lettuce and tomato sales were valued at \$154 million and \$134 million, which were up 22 percent and 13 percent respectively from 1992. Canada accounted for the bulk of total U.S. lettuce and tomato sales, with 81 percent and 86 percent respectively. The demand for U.S. lettuce in Mexico has grown from \$2.8 million in 1990 to \$7.2 million in 1993. U.S. lettuce exports to Hong Kong, currently the best Asian market, increased significantly in 1993 to \$10 million, up from \$7 million in 1992. U.S. lettuce exports to Japan grew by leaps and bounds from \$48,000 in 1990 to \$5.6 million 1992, but dropped significantly in FY 1993 to \$4.8 million. This decline in U.S. lettuce exports to Japan is believed to be in part due to more available local supplies and imports from other countries.

The demand for U.S. tomatoes in Mexico

continues to show promise, increasing from \$1.4 million in 1989 to \$16 million in 1993. U.S. tomato sales to Hong Kong, once a steady market with exports ranging in the neighborhood of \$700,000 to \$800,000, dropped dramatically in 1993 to \$362,000. As with lettuce, available local supplies and imports from neighboring countries are believed to be the primary reason for this drastic reduction.

During the past three years, U.S. potato exports have been relatively steady. In 1993, U.S. exports reached \$77 million, up 13 percent from the previous year. As usual, Canada took the lion's share of total sales which accounted for about 88 percent. The former Soviet Union and the Netherlands were the bright spots, with U.S. sales totaling \$625,000 and \$249,000, respectively. Hong Kong continued to take a steady supply of U.S. potatoes. Exports in 1993 were valued at \$584,000, up 159 percent from 1992. Sales to Mexico also jumped dramatically to \$6 million from \$3.8 million in 1992.

Asparagus, cauliflower, celery, and sweet pepper exports all registered increases during 1993. With the exception of asparagus, Canada was the primary U.S. market for this group of commodities. Japan was the leading U.S. market for asparagus, taking 48 percent of total sales, followed by Canada with 34 percent. The EU countries remained steady markets for U.S. asparagus with about \$5 million to \$6 million worth of sales from 1991 to 1993. Switzerland, a traditional market for U.S. asparagus, bought about \$5 million worth of product in FY 1993, which was down 20 percent from FY 1992.

U.S. onion exports were also among the gainers in vegetable sales in 1993. Exports during the year were valued at \$72 million, up 28 percent from 1992. Shipments to Canada accounted for 66 percent of the total value, followed by Japan, Mexico, the United Kingdom, and Taiwan with a combined market share of 29 percent. U.S. onion sales to Japan in 1993 reached a value of \$9 million, more than doubling the value from

the year before. Exports to Mexico were steady at about the \$6 million level from 1991 to 1993. Other bright spots included increased sales to the United Kingdom, \$2.7 million, up 92 percent; and United Arab Emirates, \$114,000, up 137 percent from the year before.

U.S. broccoli exports were up 23 percent in

1993 from a year earlier. Exports to Canada rose 21 percent to \$46 million. Canada accounts for approximately 67 percent of total U.S. broccoli sales.

(Emanuel McNeil, 202-720-2083)

**Top Markets for U.S. Fresh Vegetables Exports
(\$ Millions)**

Country	FY1991	FY1992	FY1993
Canada	649	653	735
Japan	57	86	106
Mexico	28	28	46
EU 12	35	31	28
Caribbean	16	18	28
Hong Kong	14	15	20
Switzerland	7	7	6
Others	25	25	28
Total	831	863	997

Source: U.S. Department of Commerce.

**Top U.S. Vegetable Exports
(\$ Millions)**

Vegetables	FY1991	FY1992	FY1993
Lettuce	132	127	155
Tomatoes	111	119	134
Potatoes	67	68	77
Broccoli	52	56	69
Onions	54	56	72
Asparagus	47	54	62
Cauliflower	43	48	50
Peppers	46	46	48
Celery	40	39	51
Others	239	250	279
Total	831	863	997

Source: U.S. Department of Commerce.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
OCT. 83

COMMODITY AND COUNTRY	COUNTRY	CURR MO LAST YR	CURR MO CURR YR	QUANTITY		LAST YEAR	VALUE (\$1,000)			YR TDT CURR YR	LAST YEAR
				YR TDT LAST YR	CURR YR		YR TDT CURR YR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	
FRESH FRUIT											
FR. APPLES(JUL)			MT								
TAIWAN	18,378	12,524	43,309	29,070	113,733	\$13,031	\$10,589	\$28,772	\$22,381	\$76,230	
CANADA	7,898	7,325	27,870	24,708	83,088	\$4,833	\$4,812	\$21,408	\$18,573	\$55,313	
MEXICO	2,442	207	14,420	18,103	89,384	\$1,070	\$120	\$8,488	\$8,872	\$49,561	
WORLD	67,585	62,430	142,310	136,807	489,348	\$38,720	\$33,638	\$95,578	\$88,938	\$300,700	
FR. PEARS(JUL)			MT								
CANADA	6,815	8,014	18,655	18,211	34,889	\$4,158	\$3,788	\$12,287	\$11,886	\$26,100	
MEXICO	2,879	3,771	10,836	12,485	34,222	\$1,445	\$2,028	\$6,010	\$6,804	\$17,370	
WORLD	13,537	18,578	37,231	38,732	100,358	\$8,384	\$8,388	\$22,388	\$22,887	\$80,944	
APRICOTS(MAY)			MT								
CANADA	0	0	3,001	2,856	3,081	\$0	\$0	\$3,383	\$3,843	\$3,508	
EU-12	0	0	483	308	464	\$0	\$0	\$1,258	\$949	\$1,283	
UNITED KINGDOM	0	0	426	224	428	\$0	\$0	\$1,114	\$748	\$1,116	
WORLD	8	78	4,323	5,070	4,492	\$13	\$78	\$5,533	\$8,517	\$6,784	
FR CHERRIES(MAY)			MT								
JAPAN	0	0	12,144	12,420	12,182	\$0	\$0	\$81,981	\$77,240	\$81,991	
CANADA	8	11	8,627	8,183	8,807	\$8	\$21	\$17,803	\$13,258	\$18,106	
EU-12	38	0	3,228	1,888	3,521	\$170	\$0	\$10,975	\$8,801	\$11,520	
WORLD	72	11	30,532	26,220	30,888	\$236	\$21	\$103,888	\$110,175	\$104,862	
PEACH-NECTRN(MAY)			MT								
CANADA	183	360	48,811	48,832	51,481	\$173	\$307	\$41,828	\$43,123	\$44,175	
WORLD	1,851	1,078	87,878	81,218	68,688	\$1,277	\$784	\$56,037	\$64,452	\$57,810	
PLUM-PRUNES(MAY)			MT								
CANADA	781	844	24,411	22,385	26,486	\$524	\$555	\$18,388	\$22,222	\$20,768	
TAIWAN	811	18	21,818	13,733	21,848	\$810	\$12	\$15,043	\$12,188	\$15,071	
HONG KONG	411	137	8,454	7,885	8,470	\$485	\$151	\$8,578	\$8,825	\$8,609	
WORLD	3,853	2,448	86,814	63,877	87,688	\$3,000	\$1,842	\$48,734	\$48,942	\$51,865	
FR AVOCADOS(OCT)			MT								
EU-12	0	197	0	187	5,288	\$0	\$170	\$0	\$170	\$5,844	
CANADA	123	268	123	258	5,185	\$183	\$287	\$183	\$287	\$4,492	
JAPAN	45	121	45	121	3,234	\$182	\$110	\$182	\$110	\$3,387	
FRANCE	0	88	0	88	2,832	\$0	\$77	\$0	\$77	\$2,734	
UNITED KINGDOM	0	43	0	43	1,864	\$0	\$43	\$0	\$43	\$2,088	
WORLD	168	582	188	582	14,188	\$328	\$574	\$328	\$574	\$14,224	
FR KIWIFRUIT(OCT)			MT								
TAIWAN	52	0	52	0	3,554	\$80	\$0	\$80	\$0	\$5,702	
CANADA	138	220	138	220	3,387	\$223	\$284	\$223	\$284	\$4,288	
WORLD	248	230	248	230	8,358	\$383	\$315	\$383	\$315	\$12,071	
FRESH GRAPES (MAY)			MT								
CANADA	18,101	23,223	80,489	84,113	104,410	\$18,823	\$21,338	\$84,408	\$89,812	\$103,958	
HONG KONG	3,207	3,844	16,468	14,860	18,431	\$3,734	\$4,407	\$18,577	\$18,070	\$21,588	
WORLD	38,134	41,187	148,807	152,582	187,152	\$37,214	\$42,098	\$158,511	\$172,481	\$204,124	
FR STRAWBRIS(JAN)			MT								
CANADA	1,453	1,312	34,863	34,310	35,638	\$2,170	\$1,874	\$47,895	\$48,224	\$50,008	
JAPAN	734	873	3,214	3,418	3,578	\$4,183	\$4,882	\$18,383	\$17,884	\$18,367	
EU-12	526	384	3,828	2,143	3,881	\$1,612	\$828	\$11,487	\$4,517	\$11,583	
WORLD	3,123	3,128	45,064	44,085	48,388	\$8,282	\$8,218	\$80,188	\$72,808	\$84,731	
FR ORNG INC TMPL(NOV)			MT								
JAPAN	1,730	3,361	188,214	181,788	188,214	\$805	\$3,225	\$87,384	\$87,734	\$87,384	
CANADA	8,856	4,888	170,882	208,881	170,882	\$4,881	\$3,184	\$82,750	\$100,853	\$82,760	
HONG KONG	8,681	7,288	87,028	128,588	87,028	\$4,287	\$3,788	\$51,737	\$81,277	\$51,737	
WORLD	22,388	18,147	486,215	568,348	486,215	\$10,582	\$10,868	\$285,888	\$278,578	\$285,888	
FR GRPFRT(SEP)			MT								
JAPAN	14,882	8,187	18,274	11,358	222,776	\$10,154	\$5,815	\$10,888	\$7,427	\$108,744	
EU-12	14,820	5,818	15,188	8,218	118,886	\$7,478	\$3,268	\$7,883	\$3,553	\$81,288	
CANADA	7,804	8,040	10,025	11,520	88,444	\$4,810	\$4,131	\$5,774	\$8,158	\$34,812	
FRANCE	7,526	2,530	7,727	2,738	51,050	\$3,841	\$1,732	\$3,747	\$1,836	\$25,344	
WORLD	38,857	22,226	42,738	30,072	441,003	\$22,813	\$13,405	\$25,058	\$17,888	\$220,263	
FR TANGERINES(NOV)			MT								
CANADA	421	307	8,558	8,818	8,558	\$424	\$334	\$8,232	\$7,582	\$8,232	
EU-12	0	0	2,058	648	2,058	\$0	\$0	\$1,868	\$508	\$1,968	
WORLD	421	307	11,848	8,444	11,848	\$424	\$334	\$11,868	\$8,342	\$11,868	
CANNED FRUIT			MT								
CND PEACH&NECT(JUN)			MT								
JAPAN	588	338	1,800	2,258	5,812	\$883	\$352	\$2,013	\$2,533	\$8,381	
CANADA	157	212	782	1,124	2,881	\$180	\$280	\$882	\$1,288	\$3,212	
TAIWAN	131	44	1,255	877	2,480	\$100	\$53	\$1,052	\$871	\$2,106	
WORLD	1,818	1,877	7,178	8,814	18,815	\$1,878	\$1,838	\$6,647	\$8,701	\$18,887	

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
OCT. 83

COMMODITY AND COUNTRY		QUANTITY			VALUE (\$1,000)						
country	curr mo	curr mo	yr tdt	curr yr	yr tdt	last	curr mo	curr mo	yr tdt	yr tdt	last
	last yr	curr yr	last yr	curr yr	curr yr	year	last yr	curr yr	curr yr	curr yr	year
CND PEARS(JUN)		MT									
CANADA	203	161	833	806	1,508	\$188	\$186	\$847	\$812	\$1,579	
EU-12	13	26	488	44	708	\$16	\$23	\$573	\$40	\$886	
UNITED KINGDOM	0	0	266	0	488	\$0	\$0	\$403	\$0	\$862	
JAPAN	36	36	112	168	606	\$23	\$38	\$108	\$181	\$566	
WORLD	378	324	1,886	1,172	3,805	\$337	\$265	\$1,710	\$1,150	\$4,071	
CND PNEAPL(JAN)		MT									
JAPAN	122	280	2,462	1,226	2,742	\$112	\$278	\$1,820	\$1,166	\$2,237	
CANADA	118	173	1,668	1,166	2,088	\$107	\$148	\$1,468	\$1,126	\$1,813	
WORLD	423	777	6,472	3,766	8,367	\$377	\$688	\$4,560	\$3,426	\$6,386	
FRT MIXTURES(JUN)		MT									
CANADA	377	787	2,183	2,848	8,642	\$637	\$608	\$3,146	\$3,482	\$8,788	
JAPAN	250	304	1,424	2,687	4,706	\$330	\$322	\$1,866	\$3,288	\$6,512	
WORLD	3,388	2,786	13,760	13,281	34,866	\$3,618	\$3,256	\$13,813	\$16,662	\$37,388	
DRIED FRUIT											
DRD RAISINS(AUG)		MT									
EU-12	8,237	5,188	16,792	17,184	58,420	\$8,231	\$7,200	\$26,136	\$26,848	\$78,224	
UNITED KINGDOM	2,612	3,273	6,283	8,276	26,585	\$3,436	\$4,111	\$12,427	\$14,008	\$36,568	
JAPAN	1,788	1,978	6,498	8,887	23,290	\$2,168	\$3,028	\$8,382	\$8,880	\$31,573	
CANADA	1,127	1,347	4,130	3,888	10,832	\$2,888	\$2,788	\$8,876	\$8,187	\$22,716	
WORLD	15,027	12,881	46,581	38,828	126,786	\$20,618	\$19,641	\$82,430	\$82,153	\$160,188	
DRD PRUNES(AUG)		MT									
EU-12	8,323	2,896	14,411	8,048	48,826	\$9,449	\$8,862	\$20,711	\$18,888	\$89,458	
JAPAN	1,818	1,708	4,208	3,889	15,311	\$2,446	\$3,686	\$8,508	\$8,087	\$26,816	
GERMANY	1,828	784	3,893	2,387	17,418	\$2,272	\$1,720	\$4,784	\$6,366	\$21,820	
ITALY	1,237	824	3,810	2,638	11,874	\$2,338	\$2,174	\$6,816	\$8,470	\$20,608	
WORLD	11,618	7,242	27,269	16,722	87,926	\$17,880	\$18,054	\$40,807	\$42,121	\$134,360	
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)		KL									
CANADA	8,671	5,037	128,211	87,388	134,864	\$4,267	\$2,302	\$68,046	\$43,742	\$58,886	
JAPAN	842	1,205	56,882	38,148	58,811	\$367	\$427	\$28,178	\$14,382	\$27,368	
EU-12	8,788	7,121	58,468	103,838	59,747	\$2,610	\$3,310	\$21,280	\$40,481	\$22,463	
WORLD	22,361	20,760	310,748	328,763	332,248	\$8,035	\$8,588	\$134,827	\$131,180	\$144,036	
ORNG JU NTCNC(DEC)		KL									
CANADA	2,762	4,828	21,501	43,053	25,104	\$2,413	\$3,030	\$23,916	\$31,356	\$28,893	
EU-12	3,486	878	30,077	21,788	32,388	\$2,571	\$864	\$21,766	\$14,318	\$23,181	
FRANCE	1,082	282	21,082	8,047	22,387	\$739	\$223	\$15,120	\$5,508	\$18,006	
UNITED KINGDOM	2,433	444	8,087	4,788	9,038	\$1,832	\$273	\$8,046	\$2,884	\$8,543	
WORLD	6,162	7,806	87,826	84,610	76,381	\$6,463	\$6,583	\$68,495	\$62,212	\$64,130	
GRPFRT JU CNC (DEC)		KL									
JAPAN	1,832	1,189	29,096	27,709	30,848	\$1,188	\$784	\$20,588	\$18,871	\$21,886	
CANADA	938	326	10,026	6,878	10,773	\$878	\$234	\$7,218	\$4,861	\$7,757	
EU-12	749	1,126	14,737	16,817	15,201	\$372	\$586	\$6,484	\$8,263	\$8,701	
WORLD	3,492	2,808	56,896	56,801	58,902	\$2,328	\$1,736	\$36,289	\$34,206	\$37,471	
FRESH VEGETABLES											
FR ASPARAGUS(OCT)		MT									
JAPAN	4	36	4	36	7,496	\$8	\$46	\$6	\$48	\$28,684	
CANADA	143	124	143	124	8,888	\$362	\$326	\$382	\$326	\$21,682	
WORLD	165	182	165	182	21,288	\$402	\$372	\$402	\$372	\$82,514	
FR ONIONS(OCT)		MT									
CANADA	6,667	6,612	6,667	8,812	117,161	\$2,601	\$2,251	\$2,501	\$2,261	\$47,956	
JAPAN	1,331	1,841	1,331	1,641	26,107	\$263	\$383	\$263	\$393	\$8,044	
WORLD	16,110	15,682	16,110	15,662	183,008	\$6,237	\$6,047	\$8,237	\$6,047	\$71,841	
CANNED VEGETABLES											
CND SWT CORN(AUG)		MT									
JAPAN	5,183	5,366	11,284	14,083	50,126	\$3,837	\$4,282	\$9,022	\$11,153	\$38,776	
EU-12	5,638	3,888	12,816	12,340	56,436	\$3,801	\$2,700	\$8,463	\$8,566	\$38,686	
TAIWAN	1,898	1,243	4,088	3,778	17,612	\$1,560	\$1,222	\$3,624	\$3,248	\$15,487	
UNITED KINGDOM	3,208	721	8,372	2,800	21,814	\$2,194	\$504	\$4,871	\$1,857	\$16,301	
GERMANY	1,064	1,860	2,830	4,352	17,723	\$778	\$1,180	\$2,173	\$3,118	\$12,902	
WORLD	17,802	14,038	40,078	41,087	172,124	\$12,779	\$10,861	\$30,174	\$31,800	\$128,818	
CND TOM PAS(JUL)		MT									
CANADA	6,028	3,846	17,808	18,818	48,004	\$3,848	\$3,142	\$14,882	\$14,878	\$38,088	
WORLD	7,808	8,136	24,506	31,264	68,811	\$5,684	\$7,000	\$19,802	\$26,427	\$54,408	
CND TOM SAUCE(JUL)		MT									
CANADA	2,687	4,877	13,647	18,163	48,201	\$2,838	\$6,030	\$13,820	\$18,178	\$46,486	
WORLD	4,751	8,703	22,136	23,551	69,428	\$4,411	\$8,787	\$21,082	\$23,088	\$88,083	

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
OCT. 93

COMMODITY AND COUNTRY		QUANTITY			CURREN			VALUE (\$1,000)		
COUNTRY	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND TOMATO(JUL)		MT								
CANADA	808	1,086	3,465	6,781	16,552	\$644	\$640	\$2,686	\$4,406	\$10,480
JAPAN	332	166	397	341	2,128	\$277	\$163	\$336	\$297	\$1,616
WORLD	1,518	1,615	4,731	8,981	20,390	\$1,102	\$1,137	\$3,428	\$6,867	\$13,688
FRZN VEGETABLES		MT								
FZN SWT CORN(JUL)		MT								
JAPAN	3,468	4,464	11,426	14,393	36,308	\$3,232	\$4,054	\$10,019	\$12,568	\$30,277
WORLD	8,373	7,003	20,109	23,090	59,764	\$6,161	\$9,078	\$16,146	\$18,024	\$49,536
FZN F FRY(JUL)		MT								
JAPAN	11,844	11,238	42,063	43,222	123,738	\$8,466	\$7,612	\$26,329	\$30,282	\$88,064
WORLD	16,080	16,887	68,286	78,751	202,643	\$12,636	\$13,778	\$46,686	\$53,894	\$143,878
TREE NUTS		MT								
ALMONDS UNSH(JUL)		MT								
INDIA	1,417	647	3,316	2,620	6,929	\$2,176	\$1,716	\$6,216	\$7,004	\$14,037
JAPAN	441	746	1,466	1,491	3,905	\$1,269	\$1,968	\$4,390	\$3,207	\$11,189
WORLD	2,807	1,784	6,466	6,239	19,313	\$4,767	\$4,957	\$12,717	\$12,626	\$32,864
ALMND SH/PREP(JUL)		MT								
EU-12	14,191	10,993	42,362	33,098	95,640	\$45,761	\$47,900	\$136,698	\$133,413	\$318,044
GERMANY	7,894	6,780	21,286	19,797	47,461	\$23,661	\$24,966	\$66,167	\$67,276	\$161,606
JAPAN	2,622	2,443	9,992	9,279	19,947	\$9,322	\$12,033	\$26,501	\$27,856	\$74,397
WORLD	23,534	20,578	99,973	69,713	168,499	\$78,016	\$90,991	\$226,591	\$239,921	\$584,432
WALNUTS SH(AUG)		MT								
EU-12	4,444	1,544	8,104	2,016	8,336	\$10,269	\$3,222	\$14,161	\$4,421	\$20,862
JAPAN	202	968	972	1,327	3,843	\$970	\$4,763	\$2,996	\$7,142	\$18,726
CANADA	299	168	702	372	2,363	\$1,129	\$747	\$2,665	\$1,641	\$9,469
GERMANY	1,482	278	2,748	617	3,290	\$2,604	\$466	\$6,361	\$1,387	\$7,106
WORLD	6,909	3,322	8,069	4,933	19,559	\$15,949	\$12,144	\$24,684	\$18,232	\$61,966
WALNUTS UNSH(AUG)		MT								
EU-12	21,630	24,091	27,919	29,369	30,827	\$42,876	\$49,390	\$56,846	\$61,016	\$81,644
SPAIN	7,162	6,476	6,123	6,868	6,893	\$14,002	\$12,463	\$16,808	\$13,319	\$18,809
GERMANY	4,498	6,866	9,443	6,366	9,976	\$9,192	\$11,360	\$13,176	\$12,282	\$13,521
NETHERLANDS	3,668	6,884	6,484	7,794	6,561	\$7,881	\$12,617	\$11,483	\$16,246	\$11,636
ITALY	3,582	3,189	4,080	3,366	4,601	\$7,049	\$8,205	\$9,028	\$9,568	\$9,963
WORLD	23,529	26,560	30,804	29,620	37,168	\$47,140	\$61,799	\$92,090	\$59,787	\$76,483
HOPS & PRODUCTS										
HOP PELTS(SEP)		MT								
CANADA	44	83	66	126	1,041	\$290	\$679	\$648	\$602	\$7,124
9RAZIL	0	40	167	280	1,389	\$0	\$126	\$607	\$1,398	\$6,191
EU-12	6	66	9	66	724	\$79	\$360	\$78	\$360	\$4,598
COLOM9IA	267	64	297	54	443	\$2,463	\$322	\$2,463	\$322	\$3,510
MEXICO	0	0	97	0	493	\$0	\$0	\$414	\$0	\$3,261
WORLD	419	277	716	579	5,113	\$3,505	\$1,588	\$4,686	\$3,205	\$30,886
HOP EXTRACT(SEP)		MT								
EU-12	143	129	178	196	1,469	\$1,826	\$2,546	\$2,283	\$3,156	\$24,864
MEXICO	77	268	77	269	708	\$2,544	\$2,218	\$2,544	\$2,216	\$12,127
GERMANY	89	36	62	99	710	\$616	\$370	\$611	\$713	\$11,646
WORLD	427	537	519	746	3,905	\$10,424	\$9,820	\$11,459	\$11,335	\$95,154
HOPS,NSPF(SEP)		MT								
EU-12	290	276	374	301	2,073	\$1,756	\$1,280	\$2,178	\$1,427	\$10,942
GERMANY	101	176	146	179	1,962	\$706	\$751	\$656	\$761	\$6,376
UNITED KINGDOM	100	67	146	122	305	\$976	\$639	\$948	\$876	\$1,666
WORLD	324	302	446	339	2,912	\$2,061	\$1,961	\$2,921	\$1,846	\$16,082
WINE										
GRAPE WINE(JAN)		KL								
EU-12	3,197	4,280	36,602	41,666	41,286	\$4,629	\$9,766	\$53,376	\$80,386	\$62,280
CANADA	2,984	2,284	29,269	27,016	34,117	\$4,217	\$3,436	\$36,142	\$36,766	\$43,466
UNITED KINGDOM	1,893	2,844	16,916	22,673	23,432	\$2,477	\$4,664	\$31,147	\$36,947	\$38,643
JAPAN	1,568	1,832	16,924	10,608	17,780	\$2,212	\$2,427	\$20,486	\$16,176	\$23,566
WORLD	8,808	11,442	101,926	100,716	120,432	\$14,566	\$16,966	\$136,666	\$140,946	\$165,364

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
OCT. 93

COMMODITY AND COUNTRY		QUANTITY						VALUE (\$1,000)					
		COUNTRY	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	
FR FRT & MLNS													
FR APPLES(JUL)			MT										
NEW ZEALAND	0	0	294	2,299	29,613	\$0	\$0	\$333	\$2,974	\$2,974	\$30,902		
CANADA	9,229	9,244	14,770	13,929	49,911	\$2,319	\$1,894	\$4,999	\$4,815	\$4,815	\$19,772		
CHILE	0	0	129	3,101	22,217	\$0	\$0	\$40	\$797	\$797	\$9,932		
SOUTH AFRICA	0	0	3,822	3,781	9,979	\$0	\$0	\$2,436	\$2,969	\$2,969	\$7,096		
WORLD	9,239	8,244	20,113	29,490	110,401	\$2,324	\$1,884	\$8,330	\$13,239	\$13,239	\$65,390		
FR PEARS(JUL)			MT										
CHILE	0	0	0	143	44,999	\$0	\$0	\$0	\$43	\$43	\$14,869		
ARGENTINA	0	0	0	0	14,904	\$0	\$0	\$0	\$0	\$0	\$8,230		
WORLD	993	739	1,192	1,090	84,772	\$2,467	\$1,270	\$3,277	\$1,983	\$1,983	\$32,288		
APRICOT (MAY)			MT										
CHILE	0	0	0	0	899	\$0	\$0	\$0	\$0	\$0	\$441		
NEW ZEALAND	0	0	0	0	168	\$0	\$0	\$0	\$0	\$0	\$406		
TURKEY	0	19	0	19	53	\$0	\$60	\$0	\$60	\$60	\$128		
WORLD	0	19	2	88	911	\$0	\$60	\$4	\$109	\$109	\$879		
PEACH-NEC(MAY)			MT										
CHILE	0	0	0	0	40,888	\$0	\$0	\$0	\$0	\$0	\$26,910		
WORLD	41	0	936	214	41,959	\$21	\$0	\$800	\$192	\$192	\$28,907		
PLUM-PRUNE(MAY)			MT										
CHILE	0	0	390	10	23,993	\$0	\$0	\$229	\$13	\$13	\$16,118		
WORLD	23	19	460	84	23,980	\$23	\$23	\$280	\$96	\$96	\$16,198		
FRESH GRAPES (MAY)			MT										
CHILE	0	0	4,848	2,089	294,949	\$0	\$0	\$3,069	\$1,593	\$1,593	\$207,103		
MEXICO	0	0	37,059	41,306	37,058	\$0	\$0	\$97,144	\$55,211	\$55,211	\$87,144		
WORLD	1,167	120	43,641	43,816	323,924	\$401	\$97	\$70,768	\$69,870	\$69,870	\$276,101		
FR RASPBRY(JAN)			MT										
CANADA	2	0	8,291	5,091	8,291	\$8	\$0	\$7,490	\$8,228	\$8,228	\$7,480		
CHILE	0	4	496	488	801	\$0	\$4	\$922	\$743	\$743	\$1,080		
WORLD	2	19	8,771	5,828	8,881	\$8	\$133	\$8,433	\$10,180	\$10,180	\$9,812		
FR STRAWBRIS(JAN)			MT										
MEXICO	0	7	8,009	11,982	8,238	\$0	\$10	\$8,440	\$19,993	\$19,993	\$11,127		
COLOMBIA	40	109	122	210	514	\$177	\$304	\$462	\$592	\$592	\$2,003		
WORLD	40	128	8,618	12,281	10,787	\$177	\$349	\$10,331	\$17,664	\$17,664	\$16,108		
FR 9ANANA(JAN)			MT										
COSTA RICA	78,168	79,613	792,934	791,878	854,484	\$22,138	\$21,440	\$233,031	\$236,189	\$236,189	\$290,891		
ECUADOR	86,384	68,747	769,836	644,670	898,248	\$19,180	\$14,847	\$219,498	\$176,072	\$176,072	\$268,793		
COLOMBIA	38,384	68,683	328,823	479,848	418,066	\$11,212	\$18,132	\$103,470	\$133,819	\$133,819	\$127,406		
GUATEMALA	37,868	26,487	316,097	327,276	382,271	\$11,888	\$8,030	\$106,038	\$104,341	\$104,341	\$123,787		
HONDURAS	32,909	32,499	349,893	336,784	410,988	\$8,027	\$7,874	\$92,681	\$84,809	\$84,809	\$108,188		
MEXICO	39,419	24,491	326,197	297,590	399,027	\$9,518	\$7,163	\$97,400	\$81,974	\$81,974	\$101,908		
WORLD	297,743	291,974	2,938,374	2,938,896	3,631,229	\$83,881	\$78,244	\$881,786	\$839,969	\$839,969	\$1,022,079		
FR MANGO(JAN)			MT										
MEXICO	32	0	68,256	84,439	68,256	\$44	\$0	\$82,808	\$71,828	\$71,828	\$82,916		
WORLD	167	929	73,471	108,182	79,380	\$213	\$1,262	\$88,877	\$83,707	\$83,707	\$71,487		
FR PINAPLE(JAN)			MT										
COSTA RICA	4,204	4,969	48,281	80,882	68,199	\$2,030	\$1,864	\$23,048	\$28,334	\$28,334	\$27,337		
HONDURAS	2,629	1,808	29,230	21,936	31,388	\$1,048	\$934	\$7,444	\$8,289	\$8,289	\$9,830		
DOMINICAN REP	1,406	1,642	21,818	15,820	26,204	\$348	\$380	\$6,086	\$3,870	\$3,870	\$6,817		
WORLD	9,795	9,709	103,227	106,789	121,569	\$3,929	\$3,114	\$38,868	\$38,840	\$38,840	\$43,843		
FR CANTLP(MAY)			MT										
MEXICO	3,401	784	49,272	20,388	104,964	\$1,468	\$188	\$14,847	\$6,183	\$6,183	\$28,998		
COSTA RICA	0	0	1,731	3,288	36,094	\$0	\$0	\$881	\$1,881	\$1,881	\$18,788		
HONDURAS	0	0	6,120	4,318	56,437	\$0	\$0	\$1,183	\$1,074	\$1,074	\$14,610		
GUATEMALA	283	274	4,712	2,922	32,889	\$86	\$124	\$1,142	\$992	\$992	\$8,841		
WORLD	3,684	1,091	91,778	31,349	240,849	\$1,643	\$317	\$19,442	\$9,347	\$9,347	\$76,605		

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
OCT. 93

COMMODITY AND COUNTRY		QUANTITY						VALUE (\$1,000)					
		COUNTRY	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	
FR WATRMLN(APR)			MT										
MEXICO	311	298	52,349	43,876	90,708		\$72	\$62	\$9,920	\$7,686	\$18,724		
WORLD	311	298	54,858	48,880	102,928		\$72	\$62	\$10,347	\$8,168	\$19,589		
FR MELON,OT(MAY)			MT										
MEXICO	2,744	2,868	20,894	16,610	61,797		\$907	\$998	\$8,837	\$4,738	\$17,944		
COSTA RICA	0	0	989	871	24,946		\$0	\$0	\$489	\$314	\$11,288		
WORLD	2,768	2,998	26,518	19,248	121,999		\$820	\$885	\$8,267	\$6,714	\$44,039		
FR ORANGES(NOV)			MT										
MOROCO	0	0	4,504	0	4,504		\$0	\$0	\$3,033	\$0	\$3,033		
AUSTRALIA	0	1	2,517	4,559	2,517		\$0	\$2	\$1,269	\$8,287	\$1,268		
MEXICO	0	24	2,910	1,291	2,919		\$0	\$7	\$1,207	\$490	\$1,207		
DOMINICAN REP	39	143	3,417	2,299	3,417		\$10	\$46	\$949	\$830	\$848		
WORLD	168	288	16,929	10,360	16,929		\$37	\$77	\$7,388	\$8,274	\$7,399		
FR LIMES(APR)			MT										
MEXICO	10,911	8,964	51,982	74,773	92,944		\$1,701	\$1,688	\$8,568	\$18,304	\$22,564		
WORLD	11,814	9,701	53,815	77,819	98,407		\$1,908	\$1,820	\$10,061	\$17,344	\$23,861		
FR LEMONS(AUG)			MT										
SPAIN	0	0	0	1,744	3,992		\$0	\$0	\$0	\$458	\$1,084		
EU-12	0	0	0	1,744	3,992		\$0	\$0	\$0	\$459	\$1,084		
CHILE	0	0	372	1,044	1,804		\$0	\$0	\$120	\$589	\$912		
WORLD	389	296	1,804	4,364	7,296		\$73	\$118	\$319	\$1,497	\$2,269		
FR MANDRINS(NOV)			MT										
MOROCO	0	0	4,445	4,427	4,445		\$0	\$0	\$5,334	\$3,834	\$5,334		
EU-12	0	1	4,551	6,890	4,551		\$0	\$7	\$6,124	\$7,867	\$6,124		
SPAIN	0	1	4,549	6,890	4,548		\$0	\$7	\$6,121	\$7,867	\$6,121		
MEXICO	1,543	74	8,301	9,492	9,301		\$948	\$34	\$3,644	\$2,800	\$3,644		
JAPAN	0	0	879	915	878		\$0	\$0	\$1,794	\$1,315	\$1,794		
WORLD	1,544	110	19,883	19,334	19,993		\$952	\$67	\$19,233	\$19,297	\$18,233		
CANNED FRUIT													
CND MANDRN(JAN)			MT										
EU-12	1,137	752	33,310	17,470	36,378		\$1,441	\$864	\$43,490	\$19,913	\$46,781		
SPAIN	1,137	751	33,309	17,461	36,374		\$1,441	\$863	\$43,478	\$18,594	\$46,767		
CHINA, PEOPLES REP	1,480	1,978	21,399	16,991	24,239		\$1,412	\$1,399	\$21,495	\$13,414	\$23,991		
WORLD	2,813	2,429	59,811	34,247	92,085		\$2,971	\$2,042	\$87,993	\$31,129	\$72,991		
CND 8LK OLV(NOV)			MT										
EU-12	772	1,139	13,372	12,276	13,372		\$1,919	\$2,009	\$29,910	\$24,827	\$29,810		
SPAIN	638	809	11,550	10,260	11,550		\$1,406	\$1,599	\$23,960	\$19,913	\$23,990		
MOROCCO	402	212	3,799	2,991	3,799		\$645	\$359	\$8,303	\$4,733	\$8,303		
WORLD	1,199	1,359	17,405	15,091	17,405		\$2,490	\$2,393	\$35,918	\$28,889	\$36,919		
CND GRN OLV(NOV)			MT										
EU-12	4,517	4,648	38,529	41,182	39,529		\$13,640	\$11,964	\$100,411	\$104,738	\$100,411		
SPAIN	4,385	4,562	37,929	40,160	37,829		\$13,414	\$11,937	\$88,840	\$102,781	\$88,840		
WORLD	4,702	4,788	40,152	43,249	40,162		\$13,959	\$12,194	\$103,279	\$109,070	\$103,278		
CND PEACH(JUN)			MT										
EU-12	4,297	2,049	8,911	8,523	20,083		\$2,960	\$1,183	\$4,878	\$3,823	\$13,746		
GREECE	4,008	1,919	9,573	8,238	18,021		\$2,799	\$1,064	\$4,428	\$3,822	\$12,888		
WORLD	4,272	2,804	9,347	9,089	21,921		\$2,873	\$1,922	\$5,742	\$4,967	\$15,108		
CND APRICOT(JUN)			MT										
ISRAEL	190	95	891	326	843		\$192	\$99	\$790	\$392	\$975		
EU-12	21	21	212	269	610		\$69	\$51	\$435	\$388	\$826		
FRANCE	9	7	72	49	149		\$29	\$17	\$195	\$129	\$419		
WORLD	356	232	1,391	1,994	2,963		\$376	\$261	\$1,895	\$1,868	\$3,578		
CND PINAPLE(JAN)			MT										
PHILIPPINES	8,419	9,895	101,221	107,114	128,193		\$5,831	\$9,528	\$87,951	\$73,859	\$85,738		
THAILAND	9,545	10,987	156,889	151,168	174,077		\$6,808	\$6,605	\$106,551	\$91,190	\$117,327		
WORLD	20,244	26,006	296,979	284,632	340,973		\$13,000	\$13,487	\$181,883	\$179,741	\$225,308		

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COMMODITY AND COUNTRY		QUANTITY			VALUE (\$1,000)					
country	curr mo last yr	curr mo curr yr	yr tdt last yr	yr tdt curr yr	last year	curr mo last yr	curr mo curr yr	yr tdt last yr	yr tdt curr yr	last year
DIRED FRUIT										
DRD APRCT(JUL)		MT								
TURKEY	1,388	891	2,461	2,339	10,217	\$3,363	\$1,776	\$6,006	\$6,787	\$23,134
WORLD	1,388	788	2,621	2,461	10,518	\$3,363	\$1,981	\$8,152	\$8,053	\$23,683
DATES(SEP)		MT								
PAKISTAN	1	16	89	70	3,720	\$2	\$20	\$61	\$83	\$4,036
CHINA, PEOPLES REP	18	0	50	0	1,090	\$28	\$0	\$106	\$0	\$1,152
WORLD	86	62	266	189	6,496	\$166	\$122	\$494	\$299	\$8,616
DRD FIG(SEP)		MT								
EU-12	498	434	496	455	989	\$1,320	\$1,034	\$1,320	\$1,090	\$2,403
GREECE	489	422	489	443	943	\$1,300	\$992	\$1,300	\$1,047	\$2,301
TURKEY	87	62	87	231	1,240	\$215	\$146	\$215	\$275	\$1,300
WORLD	583	888	616	1,571	2,771	\$1,638	\$1,394	\$1,838	\$1,798	\$3,969
DRD RAISIN(AUG)		MT								
MEXICO	625	726	2,026	2,438	3,862	\$666	\$659	\$1,334	\$2,141	\$2,506
CHILE	36	120	312	496	1,441	\$46	\$140	\$388	\$607	\$1,774
TURKEY	100	98	268	376	1,626	\$108	\$110	\$274	\$402	\$1,866
WORLD	984	982	2,820	3,377	8,717	\$722	\$932	\$2,024	\$3,233	\$8,070
FRUIT JUICES (SSE)										
APPLE JUIC(JUL)		KL								
EU-12	18,849	16,998	32,798	80,624	229,488	\$7,260	\$4,023	\$13,137	\$13,795	\$69,782
ARGENTINA	14,856	28,414	96,616	167,667	222,727	\$3,986	\$6,397	\$29,946	\$31,997	\$68,379
GERMANY	16,993	13,978	28,360	42,688	186,794	\$6,160	\$3,380	\$9,469	\$9,916	\$68,116
CHILE	13,902	26,284	61,773	93,736	110,498	\$4,420	\$6,470	\$29,160	\$16,666	\$36,766
WORLD	64,330	90,163	263,261	413,739	822,182	\$21,222	\$16,597	\$91,416	\$66,165	\$246,312
FCOJ(DEC)		KL								
BRAZIL	132,982	182,980	882,316	917,318	973,422	\$26,676	\$32,478	\$229,417	\$166,211	\$249,264
WORLD	137,119	176,614	956,410	1,044,777	1,075,460	\$28,602	\$36,204	\$260,793	\$179,057	\$281,912
GRAPE JU(JAN)		KL								
ARGENTINA	7,613	740	83,897	4,740	90,118	\$2,656	\$241	\$30,664	\$2,059	\$33,526
BRAZIL	2,170	1,805	20,293	16,718	27,567	\$693	\$466	\$8,548	\$8,002	\$8,563
SOUTH AFRICA	915	82	21,300	16,024	24,460	\$338	\$17	\$7,366	\$4,624	\$8,602
WORLD	12,246	3,338	181,641	113,689	187,449	\$4,894	\$1,252	\$60,772	\$39,289	\$89,979
PNEAPL JUCN(JAN)		KL								
THAILAND	4,122	4,928	118,028	134,408	133,463	\$1,008	\$878	\$31,381	\$28,638	\$34,646
PHILIPPINES	9,868	15,781	106,020	99,573	128,027	\$2,010	\$2,840	\$21,102	\$20,643	\$26,052
WORLD	15,350	22,228	242,092	256,311	284,813	\$3,370	\$4,148	\$59,139	\$53,161	\$68,839
PNEAPL JUNC(JAN)		KL								
PHILIPPINES	933	1,826	22,748	24,164	28,920	\$345	\$876	\$8,871	\$8,989	\$10,966
JAPAN	0	426	7,206	9,596	12,935	\$0	\$56	\$3,144	\$1,894	\$4,896
WORLD	1,061	3,066	33,729	36,946	46,104	\$427	\$1,042	\$13,483	\$11,932	\$17,630
FROZEN FRUIT										
FZN STR8RY(DEC)		MT								
MEXICO	274	266	18,627	18,407	19,087	\$169	\$231	\$18,822	\$17,249	\$18,866
WORLD	364	336	20,127	19,561	20,485	\$420	\$465	\$21,137	\$20,795	\$21,676
FRESH VEGETABLES										
FR BEANS(OCT)		MT								
MEXICO	88	18	88	16	11,424	\$91	\$14	\$91	\$14	\$14,214
WORLD	95	27	96	27	12,162	\$127	\$30	\$127	\$30	\$14,996
FR CARROT(OCT)		MT								
CANADA	7,863	8,186	7,663	8,186	39,943	\$1,886	\$1,801	\$1,886	\$1,801	\$10,429
MEXICO	383	646	363	546	10,923	\$70	\$166	\$70	\$166	\$3,267
WORLD	8,037	8,711	6,037	8,711	51,432	\$1,761	\$1,989	\$1,761	\$1,989	\$14,067
FR CA6BAGE(OCT)		MT								
CANADA	1,642	1,942	1,642	1,942	17,825	\$301	\$503	\$301	\$503	\$4,420
MEXICO	160	872	180	672	6,318	\$20	\$90	\$20	\$90	\$1,542
WORLD	1,822	2,818	1,822	2,818	28,815	\$321	\$594	\$321	\$594	\$8,528

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COMMODITY AND COUNTRY		QUANTITY				LAST YEAR	VALUE (\$1,000)				
country	curr mo last yr	curr mo	curr yr	yr tdt last yr	yr tdt curr yr		curr mo last yr	curr yr	yr tdt last yr	yr tdt curr yr	last year
FR CELERY(OCT)											
MEXICO	0	56	0	56	11,581	\$0	\$23	\$0	\$23	\$4,718	
CANADA	583	344	583	344	4,843	\$137	\$107	\$137	\$107	\$1,340	
WORLD	810	400	810	400	16,923	\$138	\$131	\$138	\$131	\$8,178	
FR CUCM8R(OCT)											
MEXICO	4,131	2,488	4,131	2,488	213,506	\$1,540	\$887	\$1,540	\$887	\$78,639	
WORLD	4,498	2,814	4,488	2,814	239,842	\$1,617	\$1,124	\$1,617	\$1,124	\$65,182	
FR CAULFLWR(OCT)											
CANADA	93	524	83	524	3,019	\$28	\$170	\$28	\$170	\$888	
MEXICO	0	13	0	13	886	\$0	\$3	\$0	\$3	\$318	
WORLD	93	537	93	537	3,878	\$28	\$173	\$28	\$173	\$1,446	
FR GARLIC(OCT)											
MEXICO	10	73	10	73	10,500	\$18	\$81	\$18	\$81	\$11,055	
CHINA, PEOPLES REP	284	3,468	284	3,468	14,339	\$208	\$1,978	\$208	\$1,978	\$7,238	
ARGENTINA	0	0	0	0	2,226	\$0	\$0	\$0	\$0	\$2,490	
WORLD	347	3,760	347	3,760	29,172	\$289	\$2,084	\$288	\$2,094	\$23,145	
FR ONION(OCT)											
MEXICO	6,439	6,701	6,439	6,701	192,297	\$6,427	\$4,431	\$6,427	\$4,431	\$63,837	
WORLD	6,903	6,319	6,803	6,318	216,739	\$7,048	\$5,584	\$7,048	\$5,584	\$103,853	
FR PEPPERS(OCT)											
MEXICO	3,991	3,904	3,881	3,904	139,708	\$2,945	\$3,795	\$2,945	\$3,795	\$134,108	
EU-12	1,094	1,938	1,094	1,938	18,090	\$2,908	\$3,088	\$2,908	\$3,088	\$37,118	
NETHERLANDS	1,080	1,794	1,080	1,794	16,824	\$2,715	\$2,885	\$2,715	\$2,885	\$36,680	
WORLD	6,200	8,056	6,200	8,056	169,783	\$6,069	\$7,392	\$6,068	\$7,382	\$177,857	
FR SEED POT(OCT)											
CANADA	346	195	346	195	74,524	\$73	\$47	\$73	\$47	\$11,488	
WORLD	346	207	346	207	74,861	\$73	\$55	\$73	\$55	\$11,578	
FR T9L POT(OCT)											
CANADA	14,599	21,332	14,588	21,332	227,612	\$2,255	\$4,334	\$2,255	\$4,334	\$38,014	
WORLD	14,812	21,332	14,612	21,332	227,526	\$2,258	\$4,334	\$2,258	\$4,334	\$38,017	
FR TOMATO(OCT)											
MEXICO	7,295	19,710	7,295	19,710	366,189	\$3,788	\$11,292	\$3,788	\$11,292	\$299,192	
WORLD	7,939	19,755	7,939	19,755	390,912	\$4,499	\$12,780	\$4,499	\$12,780	\$307,454	
FR ASPARG(OCT)											
MEXICO	320	502	320	502	22,813	\$518	\$725	\$518	\$725	\$31,593	
PERU	520	800	520	800	4,719	\$639	\$1,045	\$638	\$1,045	\$4,747	
WORLD	1,674	2,273	1,674	2,273	29,962	\$1,974	\$2,732	\$1,974	\$2,732	\$39,213	
CANNED VEGETABLES											
CND TOM PST(JUL)											
MEXICO	0	0	0	183	20,312	\$0	\$0	\$0	\$129	\$14,919	
CHILE	1,387	99	4,453	518	7,176	\$753	\$82	\$2,409	\$386	\$4,122	
WORLD	1,944	683	8,088	2,904	31,389	\$1,041	\$538	\$3,509	\$2,062	\$21,730	
CND TOM SAUCE(JUL)											
CANADA	93	124	398	1,861	4,485	\$47	\$99	\$220	\$1,002	\$2,499	
CHILE	40	38	99	230	2,239	\$22	\$27	\$43	\$139	\$1,326	
DOMINICAN REP	198	12	690	177	1,827	\$122	\$12	\$445	\$128	\$1,050	
EU-12	32	298	346	427	963	\$28	\$134	\$323	\$223	\$768	
ITALY	32	295	289	423	770	\$28	\$130	\$297	\$215	\$708	
WORLD	389	689	1,655	2,783	9,983	\$256	\$303	\$1,143	\$1,705	\$5,998	
CND TOMATO(JUL)											
CHILE	1,817	474	8,468	4,340	18,830	\$881	\$272	\$2,544	\$2,134	\$7,482	
EU-12	1,214	1,770	4,688	4,854	18,785	\$478	\$574	\$2,115	\$1,463	\$6,087	
ITALY	1,086	1,735	3,854	4,534	16,580	\$439	\$558	\$1,555	\$1,407	\$5,399	
ISRAEL	2,783	1,985	4,569	5,693	7,434	\$784	\$486	\$1,241	\$1,670	\$2,234	
WORLD	6,213	4,316	17,613	18,219	46,297	\$2,163	\$1,437	\$8,862	\$8,084	\$17,912	
CND MSHROOM(JUL)											
INDONESIA	1,395	695	6,379	3,710	15,869	\$3,545	\$1,446	\$14,517	\$9,340	\$38,380	
CHINA, PEOPLES REP	1,777	1,044	4,780	4,887	11,240	\$3,222	\$1,918	\$9,324	\$9,084	\$19,532	
HONG KONG	747	704	1,920	2,193	7,588	\$1,474	\$1,151	\$3,911	\$3,733	\$14,300	
WORLD	5,083	3,329	18,623	13,787	48,216	\$11,068	\$7,893	\$37,381	\$30,118	\$104,868	
CND ARTCHK(JAN)											
EU-12	141	94	4,180	4,613	4,463	\$263	\$186	\$8,780	\$7,398	\$7,314	
SPAIN	141	70	4,016	4,428	4,281	\$263	\$145	\$8,708	\$7,288	\$7,208	
WORLD	178	122	4,244	4,873	4,536	\$320	\$262	\$8,814	\$7,863	\$7,438	

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COMMODITY AND COUNTRY	CURR MO LAST YR	CURR MO CURR YR	QUANTITY			YR TDT CURR YR	LAST YEAR	VALUE (\$1,000)			YR TDT CURR YR	LAST YEAR
			YR TDT LAST YR	CURR MO LAST YR	CURR MO CURR YR			YR TDT LAST YR	CURR MO CURR YR	YR TDT LAST YR		
FROZEN VEGETABLES												
FZN BROCOLI(SEP)		MT										
MEXICO	12,977	9,045	26,076	12,993	159,936	\$9,122	\$4,019	\$17,366	\$9,377	\$109,162		
GUATEMALA	1,691	2,614	4,137	5,105	15,367	\$1,462	\$1,663	\$3,190	\$3,327	\$10,897		
WORLD	14,976	6,663	29,231	19,026	176,246	\$10,925	\$6,997	\$20,566	\$11,729	\$117,126		
FZN CAULFLR(SEP)		MT										
MEXICO	2,963	3,055	4,337	4,456	20,166	\$2,272	\$2,569	\$3,231	\$3,657	\$14,433		
WORLD	3,036	3,261	4,596	5,036	22,097	\$2,339	\$2,704	\$3,432	\$3,960	\$15,992		
FZN POTATO(SEP)		MT										
CANADA	6,569	11,101	15,477	20,727	121,553	\$5,222	\$9,119	\$9,975	\$11,542	\$99,934		
WORLD	9,597	11,151	15,536	20,776	121,959	\$5,240	\$6,164	\$6,734	\$11,561	\$67,093		
TREE NUTS												
PISTACHIO NSH(SEP)		MT										
HONG KONG	0	0	0	0	40	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TURKEY	4	15	4	30	7	\$16	\$42	\$16	\$64	\$24		
WORLD	4	15	4	30	47	\$16	\$42	\$19	\$95	\$107		
CASHEW NUT(AUG)		MT										
INDIA	3,299	2,969	9,031	9,599	31,089	\$14,974	\$11,139	\$42,189	\$39,412	\$139,033		
BRAZIL	2,690	2,314	7,446	7,004	27,735	\$11,454	\$9,515	\$29,421	\$27,876	\$109,075		
WORLD	9,720	6,297	19,330	19,630	64,645	\$27,612	\$21,900	\$76,039	\$87,734	\$294,421		
FILBERTS(AUG)		MT										
TURKEY	313	190	480	953	3,944	\$616	\$516	\$1,292	\$2,299	\$10,245		
WORLD	323	200	504	970	4,022	\$657	\$549	\$1,395	\$2,330	\$10,544		
PECANS NSH(SEP)		MT										
MEXICO	2,399	909	3,292	717	12,772	\$6,054	\$964	\$7,910	\$1,060	\$33,991		
WORLD	2,451	606	3,410	1,044	12,920	\$9,244	\$964	\$6,060	\$2,191	\$34,310		
WINES												
CHMP&SPRK WN(JAN)		KL										
EU-12	5,078	5,316	21,663	21,234	30,392	\$39,717	\$43,224	\$162,804	\$199,662	\$246,690		
FRANCE	1,372	1,426	6,766	7,160	6,270	\$22,569	\$28,049	\$117,715	\$126,543	\$156,356		
ITALY	2,426	2,563	6,017	9,162	12,156	\$10,949	\$11,537	\$40,450	\$36,190	\$54,644		
SPAIN	1,252	1,282	6,994	6,593	9,915	\$6,124	\$5,349	\$23,824	\$21,219	\$34,579		
WORLD	5,129	5,346	22,296	21,459	30,742	\$39,994	\$43,360	\$194,117	\$199,995	\$250,919		
FT&VERM WN(JAN)		KL										
EU-12	1,097	1,709	12,999	9,993	14,354	\$3,415	\$7,402	\$46,609	\$39,059	\$52,668		
ITALY	769	1,044	6,067	5,649	8,529	\$1,560	\$2,497	\$16,634	\$13,593	\$20,848		
SPAIN	210	391	3,351	2,923	3,817	\$906	\$1,992	\$16,264	\$12,035	\$17,585		
PORTUGAL	56	236	812	1,000	1,062	\$691	\$2,952	\$7,194	\$10,030	\$10,009		
WORLD	1,113	1,719	12,993	10,111	14,493	\$3,477	\$7,499	\$49,097	\$39,566	\$53,195		
OTH GP WINE(JAN)		KL										
EU-12	804	932	92,431	3,910	93,219	\$918	\$909	\$323,930	\$9,393	\$325,385		
FRANCE	49	37	29,547	339	29,729	\$119	\$166	\$178,642	\$1,647	\$177,454		
ITALY	472	592	41,590	2,940	41,996	\$683	\$700	\$111,067	\$3,949	\$111,738		
WORLD	628	956	100,949	4,246	101,973	\$699	\$996	\$363,307	\$9,695	\$365,362		
OTH WN PROD(JAN)		KL										
JAPAN	241	151	2,001	1,911	2,361	\$701	\$426	\$5,761	\$5,910	\$9,900		
EU-12	372	523	3,691	3,080	4,423	\$539	\$607	\$5,390	\$4,320	\$9,439		
SPAIN	76	187	1,299	708	1,963	\$111	\$303	\$1,909	\$1,040	\$2,429		
ITALY	147	92	1,143	648	1,244	\$212	\$94	\$1,702	\$922	\$1,990		
UNITED KINGDOM	133	219	1,120	1,668	1,399	\$153	\$317	\$1,414	\$2,050	\$1,702		
WORLD	676	657	9,266	7,770	7,592	\$1,379	\$1,500	\$12,334	\$14,463	\$14,998		
CUT FLOWERS												
ROSES(JAN)		NONE										
COLOMIA	N/A	N/A	N/A	N/A	N/A	\$5,349	\$9,992	\$56,409	\$71,039	\$99,665		
WORLD	N/A	N/A	N/A	N/A	N/A	\$7,249	\$9,297	\$90,019	\$94,531	\$90,442		
CARNATIONS(JAN)		NONE										
COLOMIA	N/A	N/A	N/A	N/A	N/A	\$5,332	\$9,274	\$68,513	\$96,943	\$83,144		
WORLD	N/A	N/A	N/A	N/A	N/A	\$5,461	\$6,421	\$71,126	\$99,764	\$99,106		

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